

Post-Pandemic Economic Recovery Forums 2021



Labour Market Forums: Post Pandemic Economic Recovery

Renfrew County
March 11-12, 2021

| Labour Market Clusters | Date | # |
|---|--------------------------------|----|
| Tourism, Retail, Hospitality, Hotels, Downtowns and Professional Services Forum | Thursday March 11 (9am – 11am) | 8 |
| Healthcare, Social Services, Not-for-Profit Agencies and Public Institutions (Education, Military, Hospitals) | Thursday March 11 (1pm to 3pm) | 12 |
| Real Estate, Developers, Construction and Skilled Trades | Friday March 12 (9am – 11am) | 5 |
| Industrial, Transportation, Manufacturing, Agriculture and Forestry | Friday March 12 (1pm to 3pm) | 7 |

Participants:
See participant list

In Association with:
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Executive Summary

March 2021 marked the one year anniversary of the start of the COVID-19 worldwide pandemic in North America. Like all communities in Canada, Renfrew County felt the impact of the pandemic as province wide shutdowns were ordered, many employees began working from home, and businesses adjusted to selling products and services online, if that was possible.

The rollout of vaccinations provided some hope that the pandemic would soon end, but there is still some uncertainty of when the new normal will arrive. To address the question of how Renfrew County can best position itself for a successful post pandemic economic recovery, several organizations came together to hold a series of labour market forums to address some of the critical issues that have presented themselves during the pandemic. More importantly, the forums were designed to seek input on what conditions would need to be in place for the economy to prosper.

The partnership involved Algonquin College's Pembroke Campus, the Lanark-Renfrew Labour Market Working Group, the County of Renfrew, the city of Pembroke and the Upper Ottawa Valley Chamber of Commerce. The partners opted to break the forums into four clusters, acknowledging that the pandemic's impact has been felt differently by sectors. For example, the hospitality, retail and tourism sectors have been particularly hard hit because of health and safety concerns that were difficult to mitigate, while the construction sector had unprecedented demand but faced labour market shortages and rising supply costs.

This report summarizes the results of these labour market forums. When coupled with the 2021 EmployerOne survey results gathered by the Lanark-Renfrew Labour Market Working group, there is a significant body of research that paints a picture of the pandemic's impact on our local labour market and economy.

The feedback offered from the participants is not a prescribed blueprint for the future, but it does offer insight that can inform strategy development, whether that strategy is implemented within a municipality, a business or an organization. The common themes that emerged from the forums also invite collaboration and community planning.

The COVID-19 pandemic has accelerated the use of technology and has potentially transformed the way many businesses will operate moving forward. It has also further exposed some of the challenges that rural areas face such as a lack of broadband connectivity, skilled labour shortages and an aging population.

It has also created new opportunities to address some of these issues. Already, there have been announcements of further government investment in improving internet connectivity in smaller communities and a vibrant real estate market is an early indicator of the potential for out-migration from larger urban centres to rural areas, a reversal of a decades long trend of rural residents moving to bigger cities to enhance their job prospects.

Of course, the future is not always predictable. Such is the case at this time in world history, but the work done through this project is a starting point to continue the conversation on what Renfrew County needs to do to ensure it has a successful economic recovery from the COVID-19 pandemic. So, let us begin.

This document contains proceedings from labour market forums held across four sectors on March 11-12, 2021. The purpose of the forums was to explore the opportunities and challenges related to setting up the region for success in the post-pandemic world. Each group was asked the following:

- What challenges do you think your industry or specific organization will start or continue to face after the COVID-19 pandemic?
- What opportunities have developed due to the pandemic that provide your industry or organization growth or innovation potential looking to the future?
- What supports will you need from government and support agencies after the COVID-19 pandemic in order to ensure success and growth in your industry/business?
- What is the largest change your organization has made over the past year that will continue to shape how you operate after the pandemic?
- What are your biggest workforce needs and gaps?

Common themes across all forums included:

1. Need for broadband connectivity: while the problem has existed for many years, the need for affordable and reliable access to the internet in rural areas was amplified during the pandemic;
2. Staff engagement and mental health supports: remote working and unpredictable futures have negatively impacted employee engagement, morale and anxiety;
3. Greater dependence on technology capabilities: reduction in travel, face to face meetings, increased demand for on-line service delivery has heightened the dependence on skills and capacity in Information Technology;
4. Need for a sustainable & stable workforce: with staff leaving and increasing demand for services, there is increased pressure for continuity in skills, knowledge, corporate memory, and viable succession planning;
5. Remote & flexible work arrangements: restricted in-person gatherings have created new tensions (and benefits) related to working from home;
6. Consistent communications from government on protocols, rules, opening: mixed messages from various levels of government and health agencies have created confusion, frustration and planning difficulties across all sectors.

Sector-specific differences

Within the **tourism, hospitality, downtown, professional services sector cluster**, some of the more prevalent issues were:

- Increased need to comply with cleaning & hygiene requirements;
- Heightened attention to client safety;
- Realization that going online was necessary to survive (in areas like booking, service delivery, client interaction);

- The need to upskill employees given the new online demand and the associated complexities;
- Many hoped that the government would continue financial support (CEWS, loans)

Within the **health care, social services, non-profit, education and military cluster**, some of the distinct issues were:

- Increase cross sectoral collaboration and the importance of relationship building among various agencies. It was noted that many new cross sector tables were formed and are working well.
- Increased needs of vulnerable individuals during the pandemic. The need for adequate mental health supports was particularly emphasized.
- The need for social service infrastructure and predictable funding levels

Within the **real estate, construction, developers, skilled trades sector cluster**, the most prevalent message were:

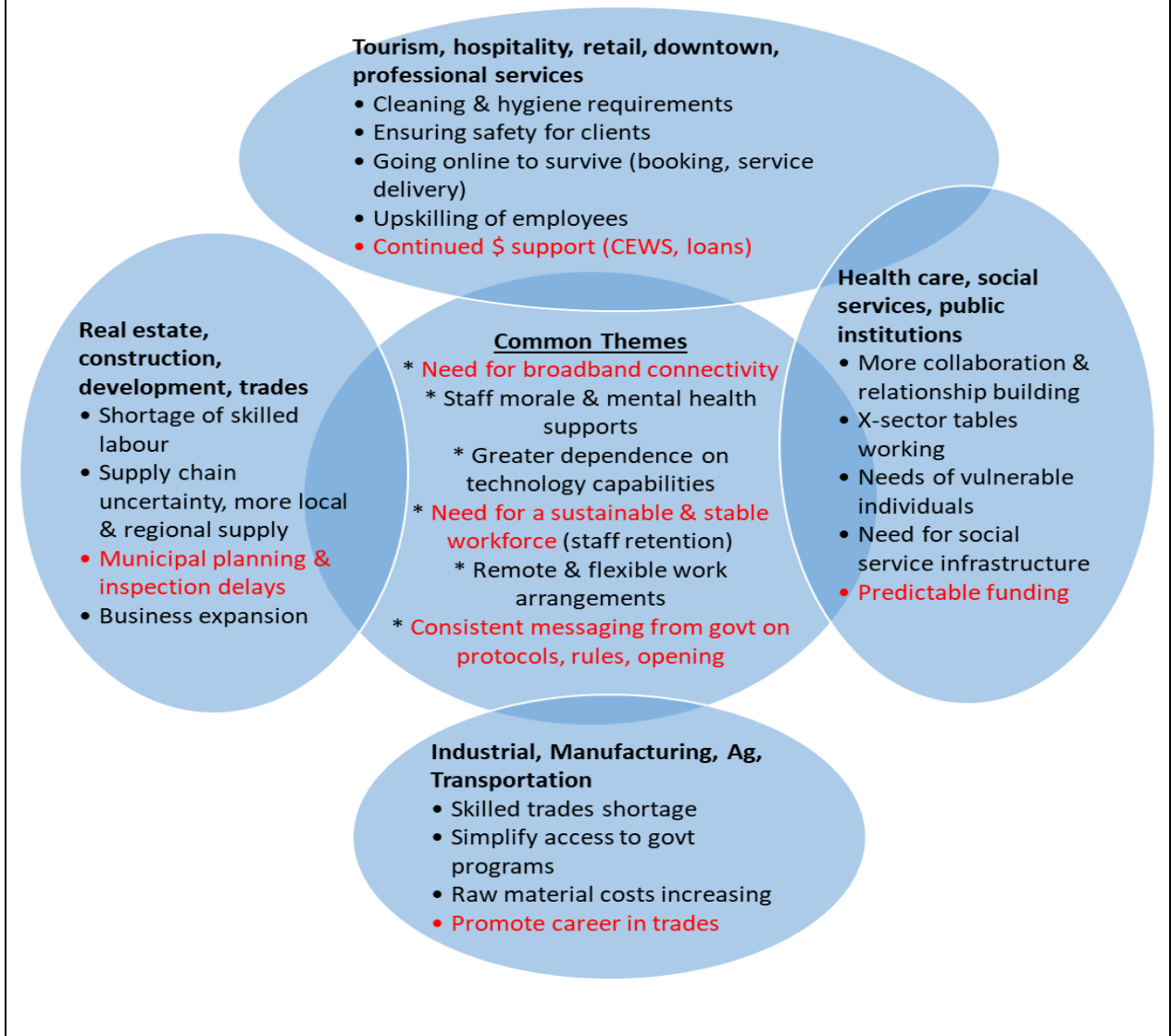
- A marked and potentially disastrous shortage of skilled labour;
- A shift to more local & regional suppliers in order to adapt to uncertainties from international supply chains;
- Frustrations with municipal planning & inspection delays resulting in stalled investment projects;

Many attendees shared that the pandemic did not slow down growth. In fact, most businesses in these sectors experienced expansion especially in the residential and commercial development. This was enhanced by increased demand for seasonal homes and renovation projects

Within the **industrial, manufacturing, transportation, agriculture, and forestry sector cluster**, the most prevalent issues were:

- An increased shortage of skilled labour stalling productivity;
- A desire to have government enhance efforts to promote careers in the trades and expanding skilled trades training programs;
- Frustration at the difficulty in accessing and navigating provincial and federal government programs;
- A substantial increase in costs of raw materials threatening margins.

Figure 1: Summary of Common Themes and Cluster Specific Issues
(needs in red)



Forum 1: Tourism, Hospitality, Downtowns, Professional Services**Industry challenges**

1. Regaining the trust of our consumers -> safety of being in a public facility
2. Pandemic fatigue, anxiety and mental health of my staff
3. Making sure that people are comfortable accessing services and buying products in-person (i.e. cleaning, online options)
4. PPE costs
5. Restrictions on #s for special events, gatherings, etc.
6. Shift in client trends - in financial services: consumer resistance to going on-line, new technology, mobile apps, infrastructure challenges
7. Will we attract enough customers to pay our staff - wage subsidies
8. Pandemic expenses - costs of new cleaning procedures as well as sick days
9. Will the tourists come back to our region? How to ensure safe for them

Opportunities

1. Improve our online shopping experience
2. Force some positive client trends with pushing to online options for access
3. The reality that companies could save massive costs by eliminating the need for rental commercial space
4. Get more patients booking online -reducing phone calls and pressure on staff so that they can focus on patients safety while on-site
5. Job creation in delivery services
6. Time in summer to do much needed repairs and cleaning (empty camp)
7. We have had to change our guests, but this is not necessarily a good for us, has an even higher cost with less return. Can't do online must be in person (note: silver lining not same for all)
8. With int'l travel likely limited we may grow our domestic & local tourism sector

Supports you need from Gov't

1. Continued financial support from government until we can get through this - CEWS, loans etc.
2. Increased and easier to access funding for "upskilling" of existing employees - red tape ☹
3. no mixed messages about safety, protocols -> clear, consistent communications
4. Communication to region about available jobs (we have needs, need a central location to get the word out)
5. Access to affordable rapid testing for staff

Biggest changes in sector

- Sector communications
- Cleaning process
- Working from home
- Consumer attitudes

Forum 2: Health care, Social services, Non-profit, education, military**Organizational/Industry Challenges**

1. Employee's **mental health** and morale and access to supports for kids, families
2. Remote working vs. going back to the office?
3. Challenges with connectivity x the county
4. Responding to reduced government funding after emergency funds end.
5. Retention of current staff, competition with likeminded employers for same candidates.
6. Remaining current with health and safety expectations from various government bodies
7. Recruiting qualified staff (**staff shortage/HR challenges**)

Opportunities emerging from COVID-19

1. Flexible work arrangements
2. Advancing technology capabilities of our org & staff
3. Increased opportunities for virtual **collaboration & new relationships** w/other stakeholders and public
4. Training & PD: alternative models (virtual platforms)
5. Local, regional and provincial tables working collaboratively within sector more effectively,
6. Reduction in travel time, cost
7. Remote/virtual delivery -> more accessible
8. Decrease of silos between organizations, sharing best practices, information

Supports needed from Government

1. Better **broadband** in rural
2. Recognition of needs of vulnerable individuals and programs
3. More investment in rural communities, social service infrastructure
4. Flexibility from labour partners on changing nature of work
5. Sufficient & predictable funding levels
6. Supports for mental health

Biggest changes in sector

- Greater dependence on technology
- Remote work/virtual** service delivery
- Staff training models
- Constant review of H&S practices
- Increased comms across sector

Forum 3: Real estate, Constructions, Developers, Skilled trades**Organizational/Industry Challenges**

1. Shortage and quality of labour across the board in all trades and poaching going on
2. If material costs do not subside, after the pandemic, will we have funds to build? (steel, lumber, aluminum, electrical supplies)
3. Supply chain of goods especially from overseas - takes a long time...
4. Training and retention of employees
5. If lockdowns continue, our activities are limited

Opportunities emerging from COVID-19

1. Influx of people/tenants/retirees to the Upper Ottawa Valley from elsewhere
2. Investments in structures (buildings in general)
3. Renovation and home improvement spending increased .. including home office expansion
4. Business expansion - more people wanting to invest e.g. residential, commercial
5. Appreciating real estate value as a result of demand - to include major multi res
6. Increase in demand for seasonal homes

Supports needed from Government

1. Skilled trade training programs expanded
2. Fix the delays or hold ups at the **municipal planning and inspection levels**
3. Promote career in trades - attract youth
4. Clear & consistent messaging from one govt body re: protocols, safety, openings
5. Continue to work on curb appeal/ downtown core to attract folks to your area
6. Indexing new housing rebates HST + PST from 1992 implement to 2021 real market value
7. Training in business expansion and growth management?

Biggest changes in sector

- More stringent with employee selection
- Supply chain**: More Canadian & North American suppliers
- Workload increase** & business expansion
- More communications with stakeholders (lenders, subtrades, s/holders)
- More spending on IT, internet

Forum 4: Industrial, Manufacturing, Transportation, Agriculture, Forestry

Organizational/Industry Challenges

1. Skilled labor: recruitment and retention
2. Employee morale / fatigue = mental health
3. Cost of raw materials
4. Protecting employees (safely)
5. Absenteeism -> isolation, quarantine (need to ensure employee safety vs. productivity)
6. Labour costs are starting to climb, margins affected. **Sustainability & stability of workforce in rural area**

Opportunities emerging from COVID-19

1. Some more time and emphasis on training and Prof Dev - alternative methods
2. none
3. Our staff has been forced to up their technology capabilities e.g. virtual meetings,
4. Very busy market for our products
5. Increased vol of customers (moving to rural)
6. Less travel time
7. Possibility to hire people not in the area with remote work

Supports needed from Government

1. Expansion of **skilled trade training** programs
2. Less red tape to simplify dealing with government and for accessing programs
3. Better **Promotion of careers** in trades - reduce stigma, attract youth,
4. Better support for capital projects not tied to employment creation (e.g. we can scale business up with automation opportunities but may not always result in job creation)
5. Broadband **connectivity**
6. We need the government to rethink their benefits strategy to incent people to work

Biggest changes in sector

- Less travel time to talk to customers
- On-line training
- Greater **dependence on technology**
- Less face2face meetings
- Safety and cleaning measures
- Work from home

Editor's Notes:

- a. The symbol // or ... indicates that two similar ideas have been merged together.
- b. This document contains the meeting proceedings and is not intended as a "Final Report"

1.0 – Forum 1: Tourism, Retail, Hospitality, Downtowns, Professional Services

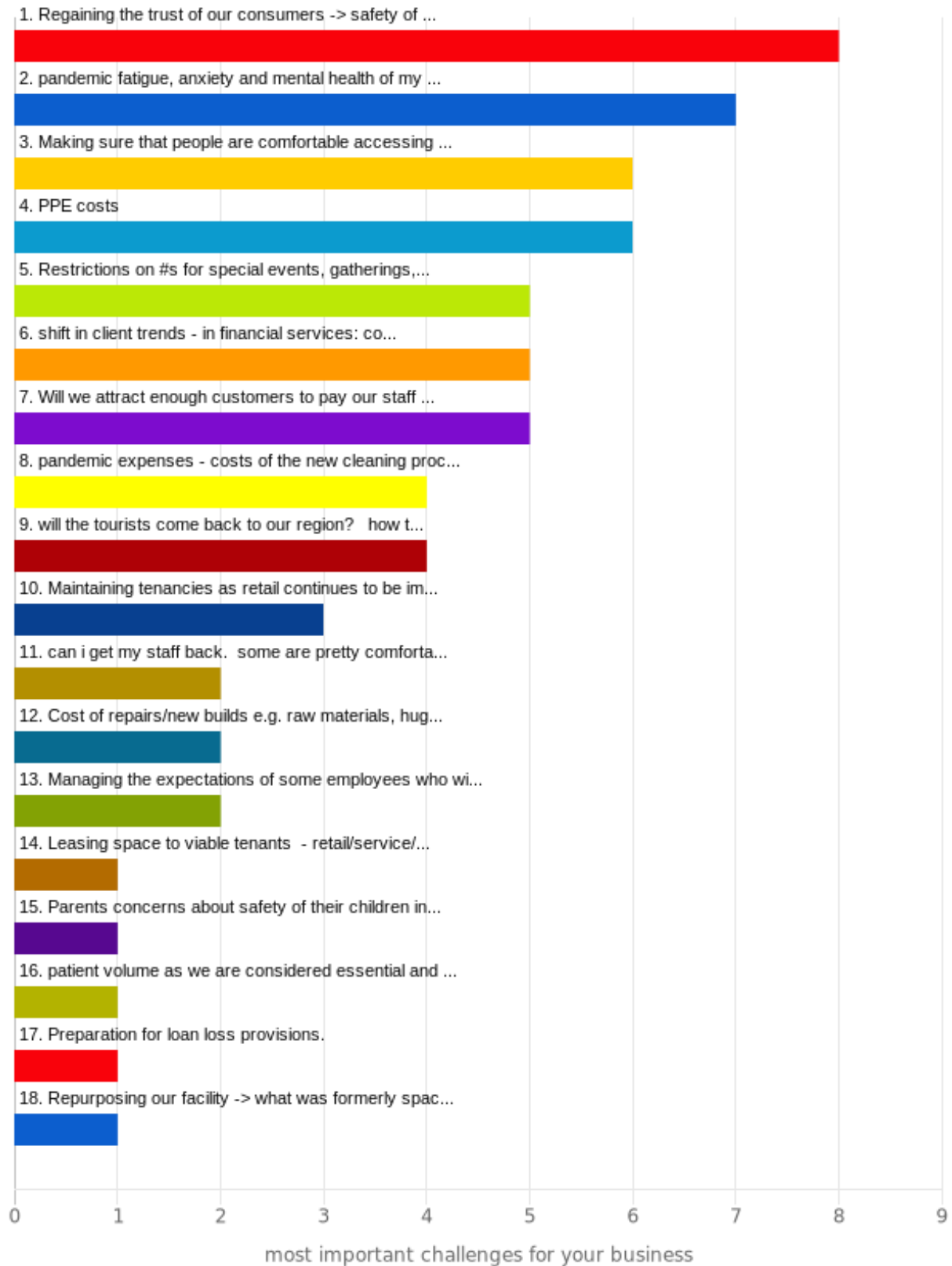
1.1 – Challenges

Rating question or instruction:

What challenges do you think your industry or specific business will start or continue to face after the COVID-19 pandemic?

| Criterion "most important challenges for your business" sorted by sum 8 selections of 18 items. Ratings submitted: 9. Total selections 64. Abstentions permitted. | | |
|--|---|-------------|
| Nr | Item | ↓Selections |
| 1 | Regaining the trust of our consumers -> safety of being in a public facility... mixed messages with screening, protocols, provincial mandates | 8 |
| 2 | pandemic fatigue, anxiety and mental health of my staff | 7 |
| 3 | Making sure that people are comfortable accessing services and buying products in-person (i.e. cleaning, online options) | 6 |
| 4 | PPE costs | 6 |
| 5 | Restrictions on #s for special events, gatherings, etc. | 5 |
| 6 | shift in client trends - in financial services: consumer resistance to going on-line, new technology, mobile apps, infrastructure challenges | 5 |
| 7 | Will we attract enough customers to pay our staff - Wage subsidies | 5 |
| 8 | pandemic expenses - costs of the new cleaning procedures as well as sick days | 4 |
| 9 | will the tourists come back to our region? how to ensure it is safe for them | 4 |
| 10 | Maintaining tenancies as retail continues to be impacted by online shopping | 3 |
| 11 | can i get my staff back. some are pretty comfortable on CEWS | 2 |
| 12 | Cost of repairs/new builds e.g. raw materials, huge demand | 2 |
| 13 | Managing the expectations of some employees who will continue to want to work remotely when we want or need them back in the workplace. | 2 |
| 14 | Leasing space to viable tenants - retail/service/entertainment | 1 |

| Criterion "most important challenges for your business" sorted by sum 8 selections of 18 items. Ratings submitted: 9. Total selections 64. Abstentions permitted. | | |
|--|--|--------------------|
| Nr | Item | ↓Selections |
| 15 | Parents concerns about safety of their children in front line tourism service | 1 |
| 16 | patient volume as we are considered essential and they need care | 1 |
| 17 | Preparation for loan loss provisions. | 1 |
| 18 | Repurposing our facility -> what was formerly space for shopping -> services and entertainment | 1 |



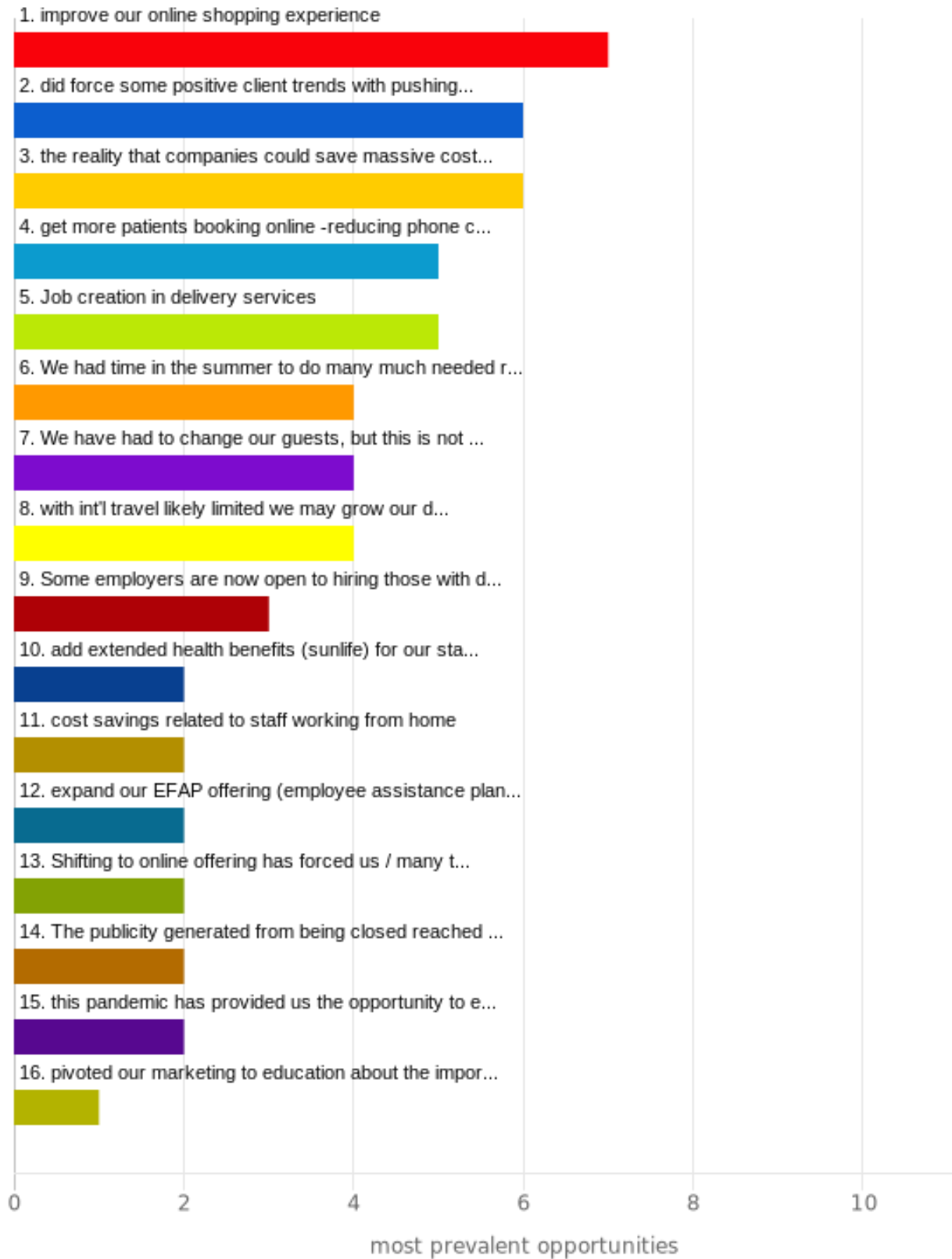
Items merged before voting:

- 1.1. Restrictions on #s for special events, gatherings, etc.
 - 1.1.1. Restrictions on special event size
- 1.2. pandemic fatigue, anxiety and mental health of my staff
 - 1.2.1. Due to Covid my clients are finding employers are not having time to train those with disabilities
 - 1.2.2. Mental Health of employees
- 1.3. PPE costs
- 1.4. Maintaining tenancies as retail continues to be impacted by online shopping
- 1.5. Regaining the trust of our consumers -> safety of being in a public facility... mixed messages with screening, protocols, provincial mandates
- 1.6. shift in client trends - in financial services: consumer resistance to going on-line, new technology, mobile apps, infrastructure challenges
- 1.7. Will we attract enough customers to pay our staff - Wage subsidies
- 1.8. Cost of repairs/new builds e.g. raw materials, huge demand
- 1.9. will the tourists come back to our region? how to ensure it is safe for them
- 1.10. Managing the expectations of some employees who will continue to want to work remotely when we want or need them back in the workplace.
- 1.11. patient volume as we are considered essential and they need care
- 1.12. Repurposing our facility -> what was formerly space for shopping -> services and entertainment
 - 1.12.1. redesigning our space to make it more COVID friendly
- 1.13. can i get my staff back. some are pretty comfortable on CEWS
 - 1.13.1. Staffing
- 1.14. Making sure that people are comfortable accessing services and buying products in-person (i.e. cleaning, online options)
- 1.15. Leasing space to viable tenants - retail/service/entertainment
- 1.16. pandemic expenses - costs of the new cleaning procedures as well as sick days
 - 1.16.1. Rapid testing needs if it continues as a part of our industry (and how to pay for it)
- 1.17. Parents concerns about safety of their children in front line tourism service
- 1.18. Preparation for loan loss provisions.

1.2 – Opportunities

Please select the most prevalent opportunities

| Criterion "most prevalent opportunities" sorted by sum 8 selections of 16 items. Ratings submitted: 11. Total selections 57. Abstentions permitted. | | |
|--|---|-------------|
| Nr | Item | ↓Selections |
| 1 | improve our online shopping experience | 7 |
| 2 | did force some positive client trends with pushing to online options for access | 6 |
| 3 | the reality that companies could save massive costs by eliminating the need for rental commercial space | 6 |
| 4 | get more patients booking online -reducing phone calls and pressure on staff so that they can focus on patients safety while on-site | 5 |
| 5 | Job creation in delivery services | 5 |
| 6 | We had time in the summer to do many much needed repairs and cleaning (due to an empty camp) | 4 |
| 7 | We have had to change our guests, but this is not necessarily a good for us, as has an even higher cost with less return. We cannot do "online" must be here in person. | 4 |
| 8 | with int'l travel likely limited we may grow our domestic and local tourism sector, and hopefully retain it longer term. | 4 |
| 9 | Some employers are now open to hiring those with disabilities | 3 |
| 10 | add extended health benefits (sunlife) for our staff | 2 |
| 11 | cost savings related to staff working from home | 2 |
| 12 | expand our EFAP offering (employee assistance plan) offer now virtual resources | 2 |
| 13 | Shifting to online offering has forced us / many to be agile and as a result reached international client base like never before | 2 |
| 14 | The publicity generated from being closed reached people who did not even know we existed. ya weird positive I know. | 2 |
| 15 | this pandemic has provided us the opportunity to expand our clinical services (we had to shut down our retail store, so more space for clinicians) | 2 |
| 16 | pivoted our marketing to education about the importance of posture (for those working at home) | 1 |



Items merged before voting:**What opportunities have developed due to the pandemic that provide your industry or business growth or innovation potential looking to the future? (Room 1, 2)**

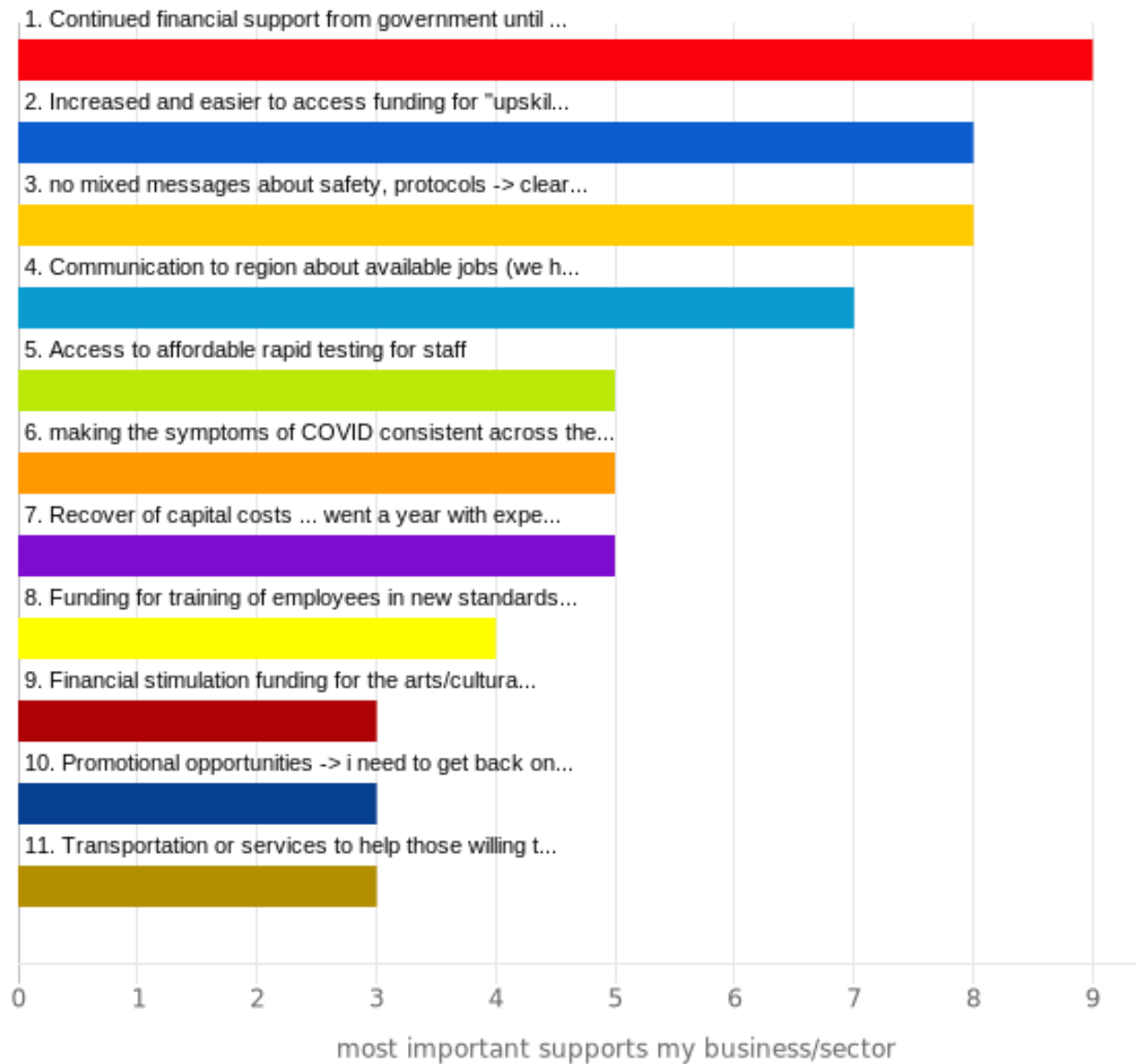
- 2.1. improve our online shopping experience
 - 2.1.1. Opportunities to develop on line ticket sales
 - 2.1.2. Put together an online store more quickly than we might have - will carry this forward
- 2.2. Shifting to online offering has forced us / many to be agile and as a result reached international client base like never before
 - 2.2.1. On line store - sell to customers on line as well as on site
- 2.3. Job creation in delivery services
- 2.4. this pandemic has provided us the opportunity to expand our clinical services (we had to shut down our retail store, so more space for clinicians)
- 2.5. add extended health benefits (sunlife) for our staff
- 2.6. We had time in the summer to do many much needed repairs and cleaning (due to an empty camp)
- 2.7. Some employers are now open to hiring those with disabilities
- 2.8. the reality that companies could save massive costs by eliminating the need for rental commercial space
- 2.9. expand our EFAP offering (employee assistance plan) offer now virtual resources
- 2.10. with int'l travel likely limited we may grow our domestic and local tourism sector, and hopefully retain it longer term.
- 2.11. cost savings related to staff working from home
- 2.12. did force some positive client trends with pushing to online options for access
- 2.13. The publicity generated from being closed reached people who did not even know we existed. ya weird positive I know.
- 2.14. get more patients booking online -reducing phone calls and pressure on staff so that they can focus on patients safety while on-site
- 2.15. We have had to change our guests, but this is not necessarily a good for us, as has an even higher cost with less return. We cannot do "online" must be here in person.
- 2.16. pivoted our marketing to education about the importance of posture (for those working at home)

1.3 – What are the supports you need from government?

Rating question or instruction:

Please select the most important supports my business/sector needs from government or related agencies

| Criterion "most important supports my business/sector" sorted by sum 6 selections of 11 items. Ratings submitted: 10. Total selections 60. Abstentions not permitted. | | |
|--|--|--------------------|
| Nr | Item | ↓Selections |
| 1 | Continued financial support from government until we can get through this - CEWS, backed loans etc. | 9 |
| 2 | Increased and easier to access funding for "upskilling" of existing employees (too much red tape) | 8 |
| 3 | no mixed messages about safety, protocols -> clear, consistent communications | 8 |
| 4 | Communication to region about available jobs (we have needs, need a central location to get the word out) | 7 |
| 5 | Access to affordable rapid testing for staff | 5 |
| 6 | making the symptoms of COVID consistent across the board - and the self isolation rules | 5 |
| 7 | Recover of capital costs ... went a year with expenses yet NO revenue... would like to have some help with the fixed costs | 5 |
| 8 | Funding for training of employees in new standards and protocols as a result of pandemic (cleaning, hospitality etc.) | 4 |
| 9 | Financial stimulation funding for the arts/cultural communities. | 3 |
| 10 | Promotional opportunities -> i need to get back on consumers radars "we are here, open, please come visit!" | 3 |
| 11 | Transportation or services to help those willing to work get to work | 3 |

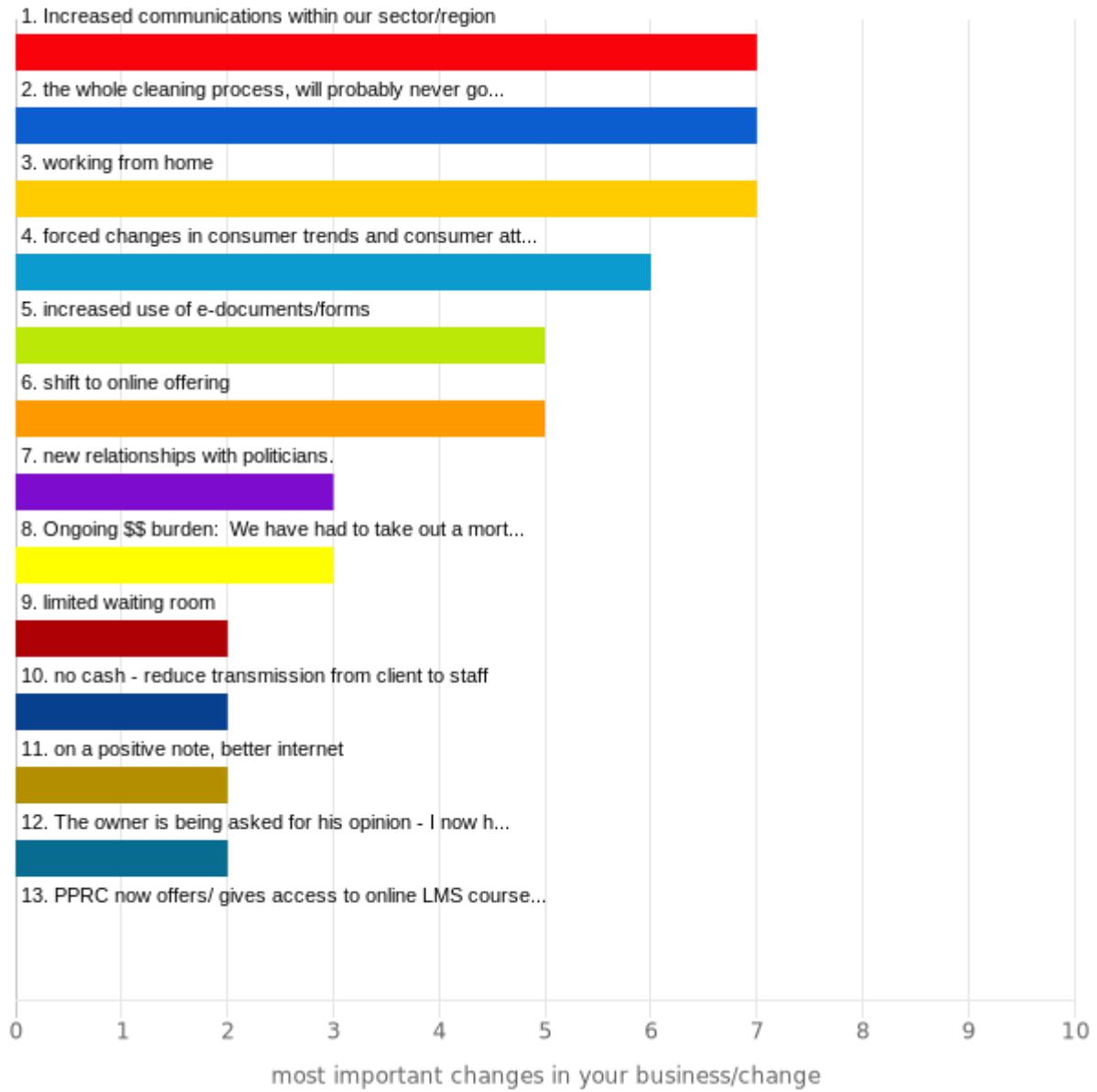


Items merged before voting:**3. What supports will you need from government and support agencies after the COVID-19 pandemic in order to ensure success and growth in your industry/business? (Room 3)**

- 3.1. Continued financial support from government until we can get through this - CEWS, backed loans etc.
 - 3.1.1. continue government backed commercial loans to support local business
 - 3.1.2. Wage subsidies
 - 3.1.3. wage subsidies to help cover the extra staff required for all the extra cleaning, there is a time component to this, and time is money
 - 3.1.4. continue with CEWS until 2022
- 3.2. no mixed messages about safety, protocols -> clear, consistent communications
 - 3.2.1. As mentioned would like to see clear messages. Very to the point, specifically with regards to the "plan" and more clear specific messaging to the consumer.
 - 3.2.2. be more clear with messaging
 - 3.2.3. clear messaging in one central location
- 3.3. Funding for training of employees in new standards and protocols as a result of pandemic (cleaning, hospitality etc.)
- 3.4. Increased and easier to access funding for "upskilling" of existing employees (too much red tape)
 - 3.4.1. funding for training so my employees can be ready
- 3.5. Access to affordable rapid testing for staff
- 3.6. Recover of capital costs ... went a year with expenses yet NO revenue... would like to have some help with the fixed costs
- 3.7. Promotional opportunities -> i need to get back on consumers radars "we are here, open, please come visit!"
- 3.8. making the symptoms of COVID consistent across the board - and the self isolation rules
 - 3.8.1. One point of contact for all Government regulations regarding the Pandemic
- 3.9. Financial stimulation funding for the arts/cultural communities.
- 3.10. Transportation or services to help those willing to work get to work
- 3.11. Communication to region about available jobs (we have needs, need a central location to get the word out)

1.4 – Single biggest change as a result of pandemic

| Criterion "most important changes in your business/change" sorted by sum | | |
|---|--|--------------------|
| 6 selections of 13 items. Ratings submitted: 10. Total selections 51. Abstentions permitted. | | |
| Nr | Item | ↓Selections |
| 1 | Increased communications within our sector/region | 7 |
| 2 | the whole cleaning process, will probably never go away. The disconnect when you have "barriers" everywhere. | 7 |
| 3 | working from home | 7 |
| 4 | forced changes in consumer trends and consumer attitudes | 6 |
| 5 | increased use of e-documents/forms | 5 |
| 6 | shift to online offering | 5 |
| 7 | new relationships with politicians. | 3 |
| 8 | Ongoing \$\$ burden: We have had to take out a mortgage on our land...we have avoided this for almost 50 years. We will now need to work this debt into our costs for years to come. | 3 |
| 9 | limited waiting room | 2 |
| 10 | no cash - reduce transmission from client to staff | 2 |
| 11 | on a positive note, better internet | 2 |
| 12 | The owner is being asked for his opinion - I now have a larger voice. on bigger picture questions | 2 |
| 13 | PPRC now offers/ gives access to online LMS courses and soon more one on one courses to improve our client skills to be more qualified for the workforce | 0 |



Items merged before voting:**4. What is the largest change your business has made over the past year that will continue to shape how you operate after the pandemic? (Room 4, 5)**

- 4.1. shift to online offering
- 4.2. working from home
 - 4.2.1. staff working from home
 - 4.2.2. Work from home
- 4.3. Ongoing \$\$ burden: We have had to take out a mortgage on our land...we have avoided this for almost 50 years. We will now need to work this debt into our costs for years to come.
 - 4.3.1. Business savings account has been hit hard resulting in pricing shifts.
- 4.4. The owner is being asked for his opinion - I now have a larger voice. on bigger picture questions
- 4.5. forced changes in consumer trends and consumer attitudes
- 4.6. PPRC now offers/ gives access to online LMS courses and soon more one on one courses to improve our clients skills to be more qualified for the workforce
- 4.7. the whole cleaning process, will probably never go away. The disconnect when you have "barriers" everywhere.
 - 4.7.1. probability the PPE for the doctors and clinical staff
 - 4.7.2. Increased cleaning of facility, installation of hand sanitizer, PPE.
- 4.8. limited waiting room
- 4.9. on a positive note, better internet
- 4.10. no cash - reduce transmission from client to staff
- 4.11. new relationships with politicians.
- 4.12. increased use of e-documents/forms
 - 4.12.1. reduction in paper forms (more digital)

1.5 – Workforce needs and gaps

If time permits: what are your biggest workforce needs & gaps?

- 5.1. Motivated young people -> Young people for the summer staff to live on site (16-23 years old)
- 5.2. lack of staffing...we have been on a hire freeze for over a year now e.g. across the board
- 5.3. staff mental health & burn out
- 5.4. lack of local applicants applying for entry level positions (hospitality)
- 5.5. Temporary/ short term staff e.g. seasonal. tourism roles
- 5.6. Nursing staff to work for the summer
- 5.7. Connecting with more Employers and Community Partners all across Renfrew County - to share our employment services across the County
- 5.8. More older workers pulled out of the workforce because of COVID. Can we get them back?

1.6 – Participants & Zoom Chat

Alastair Baird, County of Renfrew (Economic Development Services)
Brent Dick, Community Employment Services (Pembroke)
Chris Hinsperger, Bonnechere Caves
Chris Austin, Towneplace Suites Petawawa
Dez Bair-Patel, Integrated Health Centre
Heather Salovaara, City of Pembroke
Jamie Bramburger, Algonquin College
Janet Cottreau, Red Pine Camp
Jayne Brophy, Strathallen – Pembroke Mall
Lisa Hazelwood, Performance Plus Rehabilitation Care Inc.
Lorraine MacKenzie, Upper Ottawa Valley Chamber of Commerce
Lorraine Pecoskie, Holiday Inn Express Pembroke
Meghan Sutherland, Meridian Credit Union
Oliver Jacob, Labour Market Group of Renfrew and Lanark

10:29:41 From Jamie Bramburger. Manager of Community & Student Affairs to Everyone : HI all. I have noted mental health concerns as a theme all morning. You may not know that the college offers a virtual Mental Health First Aid course for front line workers. 8 hours course. 2 hours on line, followed by two "3" hours live ZOOM facilitated training sessions. Next offering is in April. If you want more info, email me at brambuj@algonquincollege.com

10:31:11 From Meghan to Everyone : Oh that is great thank you for sharing Jamie

10:38:15 From Janet Cottreau to Everyone : Yes, absolutely!!

10:41:37 From Lorraine MacKenzie to Everyone : Thank you everyone for participating this morning.

10:46:08 From Lisa to Everyone : Thank you Looking forward to more of your webinars

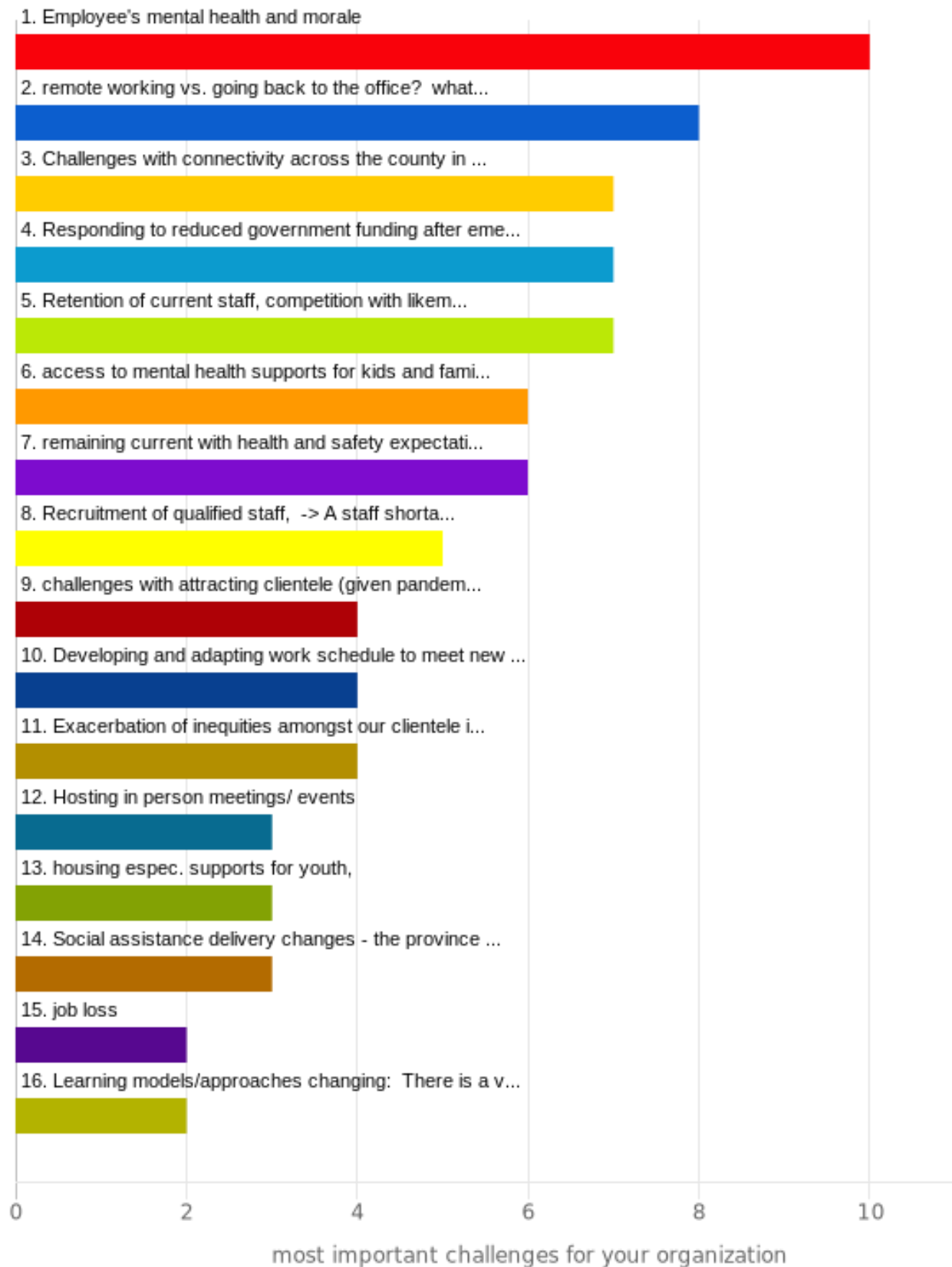
10:48:56 From Janet Cottreau to Everyone : Thank you! This was really great.

2.0 – Forum 2: Health care, Social Services, Non-Profit, Public Institutions

2.1 – Challenges

| Criterion "most important challenges for your organization" sorted by sum 8 selections of 16 items. Ratings submitted: 11. Total selections 81. Abstentions permitted. | | |
|---|--|--------------------|
| Nr | Item | ↓Selections |
| 1 | Employee's mental health and morale | 10 |
| 2 | remote working vs. going back to the office? what is the right mix? | 8 |
| 3 | Challenges with connectivity across the county in the evolution to "work from home" and "work from the office" .. | 7 |
| 4 | Responding to reduced government funding after emergency funds end. | 7 |
| 5 | Retention of current staff, competition with likeminded employers for same candidates. | 7 |
| 6 | access to mental health supports for kids and families, | 6 |
| 7 | remaining current with health and safety expectations from various government bodies | 6 |
| 8 | Recruitment of qualified staff, -> A staff shortage within all employee groups. | 5 |
| 9 | challenges with attracting clientele (given pandemic restrictions, reduction in drop-in traffic) | 4 |
| 10 | Developing and adapting work schedule to meet new client requirements | 4 |
| 11 | Exacerbation of inequities amongst our clientele in education... even more so than pre-pandemic. | 4 |
| 12 | Hosting in person meetings/ events | 3 |
| 13 | Housing, especially supports for youth | 3 |
| 14 | Social assistance delivery changes - the province has announced a new vision for social assistance (Ontario Works and Ontario Disability Support Program) - helping staff to adapt to new and changing roles | 3 |
| 15 | job loss | 2 |

| Criterion "most important challenges for your organization" sorted by sum 8 selections of 16 items. Ratings submitted: 11. Total selections 81. Abstentions permitted. | | |
|---|---|--------------------|
| Nr | Item | ↓Selections |
| 16 | Learning models/approaches changing: There is a very interesting dynamic unfolding in public education with respect to the continuum of learning... from in-person learning in schools to on-line learning at home... and the "blended" variations in between. It has an impact on how we mobilize the system for programs and/or services offered. | 2 |



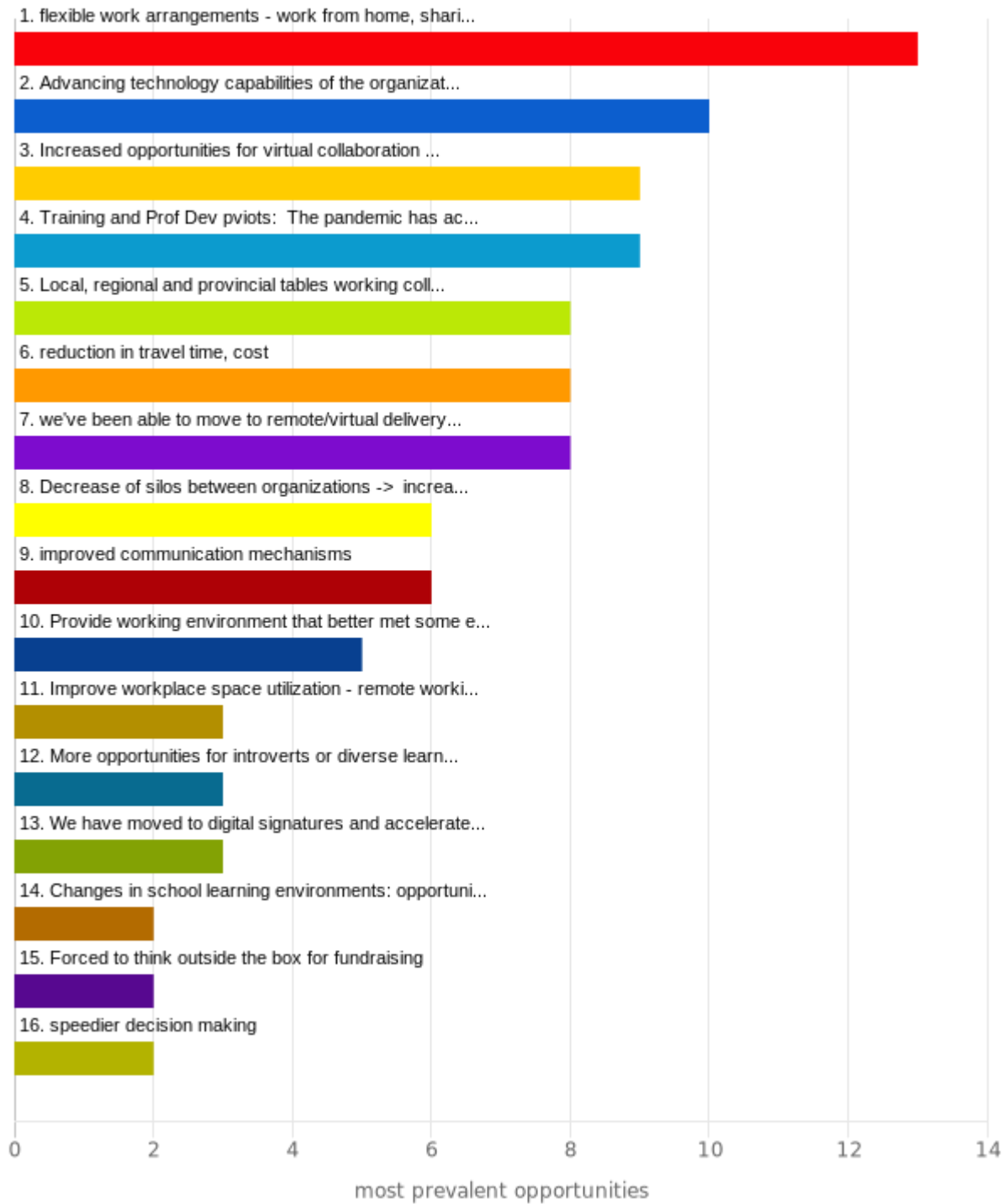
Items merged before voting:**1. What challenges do you think your industry or specific organization will start or continue to face after the COVID-19 pandemic?**

- 1.1. access to mental health supports for kids and families,
- 1.2. Employee's mental health and morale
 - 1.2.1. staff mental health and access to supports, 'help for the helpers'
 - 1.2.2. staff morale, mental health, anxiety
 - 1.2.3. morale and mental health
- 1.3. Recruitment of qualified staff, -> A staff shortage within all employee groups.
 - 1.3.1. finding qualified staff
 - 1.3.2. staff shortage
- 1.4. Learning models/approaches changing: There is a very interesting dynamic unfolding in public education with respect to the continuum of learning... from in-person learning in schools to on-line learning at home... and the "blended" variations in between. It has an impact on how we mobilize the system for programs and/or services offered.
- 1.5. challenges with attracting clientele (given pandemic restrictions, reduction in drop-in traffic)
- 1.6. Retention of current staff, competition with likeminded employers for same candidates.
- 1.7. remote working vs. going back to the office? what is the right mix?
 - 1.7.1. Staff have been working from home and are being brought back to work on a gradual basis - anticipate challenges with staff adjusting to working back in office
- 1.8. Hosting in person meetings/ events
- 1.9. Social assistance delivery changes - the province has announced a new vision for social assistance (Ontario Works and Ontario Disability Support Program) - helping staff to adapt to new and changing roles
- 1.10. Developing and adapting work schedule to meet new client requirements
- 1.11. housing espec. supports for youth,
- 1.12. job loss
- 1.13. remaining current with health and safety expectations from various government bodies
 - 1.13.1. maintaining safety protocols (distance, masking, etc.)
- 1.14. Responding to reduced government funding after emergency funds end.
- 1.15. Challenges with connectivity across the county in the evolution to "work from home" and "work from the office"..
- 1.16. Exacerbation of inequities amongst our clientele in education... even more so than pre-pandemic.

2.2 – Opportunities

| Criterion "most prevalent opportunities" sorted by sum 8 selections of 16 items. Ratings submitted: 13. Total selections 97. Abstentions permitted. | | |
|--|--|--------------------|
| Nr | Item | ↓Selections |
| 1 | flexible work arrangements - work from home, sharing jobs, one day a week in person, flex hours outside 9-5 | 13 |
| 2 | Advancing technology capabilities of the organization. Staff buy in to new technologies. | 10 |
| 3 | Increased opportunities for virtual collaboration with other stakeholders and the public | 9 |
| 4 | Training and Prof Dev pivots: The pandemic has accelerated our open-mindedness about alternative models of professional development... such as a greater emphasis on virtual platforms, online modules, etc... that can be reviewed by staff at a time that is convenient to them... as opposed to the face-to-face professional learning sessions that were held (predominantly) in the past. | 9 |
| 5 | Local, regional and provincial tables working collaboratively within sector more effectively, shared messaging | 8 |
| 6 | reduction in travel time, cost | 8 |
| 7 | we've been able to move to remote/virtual delivery overly well ...Made ourselves more accessible by incorporating virtual services | 8 |
| 8 | Decrease of silos between organizations -> increased communication with other similar services, ie, sharing of resources, best practices | 6 |
| 9 | improved communication mechanisms | 6 |
| 10 | Provide working environment that better met some employee needs | 5 |
| 11 | Improve workplace space utilization - remote working, swing space etc. | 3 |
| 12 | More opportunities for introverts or diverse learning styles to express their thoughts as this platform demonstrates. | 3 |
| 13 | We have moved to digital signatures and accelerated the modernization of our program | 3 |

| Criterion "most prevalent opportunities" sorted by sum 8 selections of 16 items. Ratings submitted: 13. Total selections 97. Abstentions permitted. | | |
|--|--|--------------------|
| Nr | Item | ↓Selections |
| 14 | Changes in school learning environments: opportunities to shape (re-shape, perhaps) the way we "do business" in school systems. It's an exciting time if we're able to seize the opportunity ahead.. | 2 |
| 15 | Forced to think outside the box for fundraising | 2 |
| 16 | speedier decision making | 2 |



Items merged before voting:**2. What opportunities have developed due to the pandemic that provide your industry or organization growth or innovation potential looking to the future?**

- 2.1. flexible work arrangements - work from home, sharing jobs, one day a week in person, flex hours outside 9-5
 - 2.1.1. Flexibility in enhancing Work-life balance for employees
 - 2.1.2. Ability for more flexibility in work completion . . . is the 9 to 5 model as important now?
 - 2.1.3. flexible work arrangements
- 2.2. Changes in school learning environments: opportunities to shape (re-shape, perhaps) the way we "do business" in school systems. It's an exciting time if we're able to seize the opportunity ahead..
 - 2.2.1. The pandemic has interrupted the 'cycle' of education that we had become so accustomed to... and allowed us to re-think some of the ways we do things... with an eye to positive change (in a place and space that would never have been conceived in the past!)
 - 2.2.2. virtual learning opportunities, access to education (online)
 - 2.2.3. Leveraging technology to enhance student and staff learning moving forward.
- 2.3. we've been able to move to remote/virtual delivery overly well ...Made ourselves more accessible by incorporating virtual services
 - 2.3.1. Utilization of remote working capabilities/ opportunities
- 2.4. Forced to think outside the box for fundraising
- 2.5. Advancing technology capabilities of the organization. Staff buy in to new technologies.
 - 2.5.1. improved technological competence across staff allows for collaboration and efficiencies
 - 2.5.2. adoption and embracing of technology across all generations of staff
- 2.6. reduction in travel time, cost
- 2.7. We have moved to digital signatures and accelerated the modernization of our program
- 2.8. Local, regional and provincial tables working collaboratively within sector more effectively, shared messaging
 - 2.8.1. More collaboration and information sharing between different provincial ministries which has allowed us to serve clients more effectively
 - 2.8.2. planning tables across sectors working virtually towards common goal, recognition of valued role, professionalism
- 2.9. Training and Prof Dev pivots: The pandemic has accelerated our open-mindedness about alternative models of professional development... such as a greater emphasis on virtual platforms, online modules, etc... that can be reviewed by staff at a time that is convenient to them... as opposed to the face-to-face professional learning sessions that were held (predominantly) in the past.
 - 2.9.1. increased training for staff
- 2.10. Provide working environment that better met some employee needs
- 2.11. Improve workplace space utilization - remote working, swing space etc.

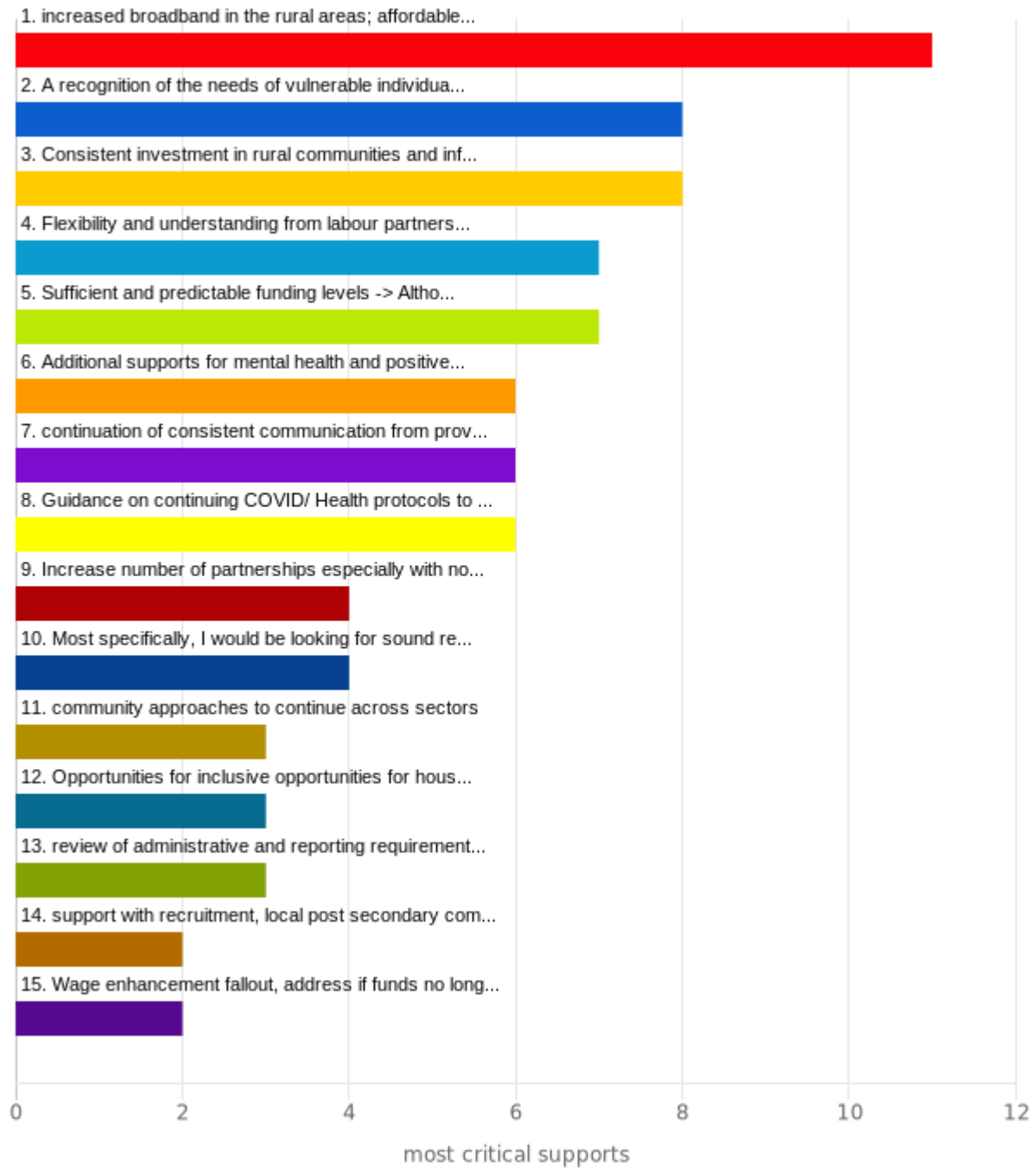
- 2.12. Decrease of silos between organizations -> increased communication with other similar services, ie, sharing of resources, best practices
- 2.13. More opportunities for introverts or diverse learning styles to express their thoughts as this platform demonstrates.
- 2.14. speedier decision making
- 2.15. improved communication mechanisms
- 2.16. Increased opportunities for virtual collaboration with other stakeholders and the public

2.3 – What are the supports you need from government?

What supports will you need from government and support agencies after the COVID-19 pandemic in order to ensure success and growth in your industry/organization?

| Criterion "most critical supports" sorted by sum 7 selections of 15 items. Ratings submitted: 12. Total selections 80. Abstentions permitted. | | |
|--|--|--------------------|
| Nr | Item | ↓Selections |
| 1 | increased broadband in the rural areas; affordable internet connectivity | 11 |
| 2 | A recognition of the needs of vulnerable individuals in our community and the importance of programs to support them | 8 |
| 3 | Consistent investment in rural communities and infrastructure (social services) | 8 |
| 4 | Flexibility and understanding from labour partners around the changing nature of work. | 7 |
| 5 | Sufficient and predictable funding levels -> Although I am not in favour of an ever-expanded deficit, some "stabilization" funding to help the transition through from the pandemic to post-pandemic period would be very helpful... I know, I know... I am to "get in line" for this! | 7 |
| 6 | Additional supports for mental health and positive well-being for staff. ..Systems to address loneliness, | 6 |
| 7 | continuation of consistent communication from prov government | 6 |
| 8 | Guidance on continuing COVID/ Health protocols to prevent/ manage reoccurrence | 6 |
| 9 | Increase number of partnerships especially with non public funded organizations | 4 |
| 10 | Most specifically, I would be looking for sound research to guide decision making related to the flexibility of work arrangements... that is, are there industry standards/benchmarks to strive for in the post-pandemic era... based on research of productivity in the home environment as it relates to actual work completed (by objectives set) | 4 |
| 11 | community approaches to continue across sectors | 3 |
| 12 | Opportunities for inclusive opportunities for housing, employment, recreation | 3 |
| 13 | review of administrative and reporting requirements with a view to minimize admin burden and maximize service delivery | 3 |

| Criterion "most critical supports" sorted by sum 7 selections of 15 items. Ratings submitted: 12. Total selections 80. Abstentions permitted. | | |
|--|---|--------------------|
| Nr | Item | ↓Selections |
| 14 | support with recruitment, local post-secondary commitment to sector | 2 |
| 15 | Wage enhancement fallout, address if funds no longer available to address | 2 |



Items merged before voting:**3. What supports will you need from government and support agencies after the COVID-19 pandemic in order to ensure success and growth in your industry/organization?**

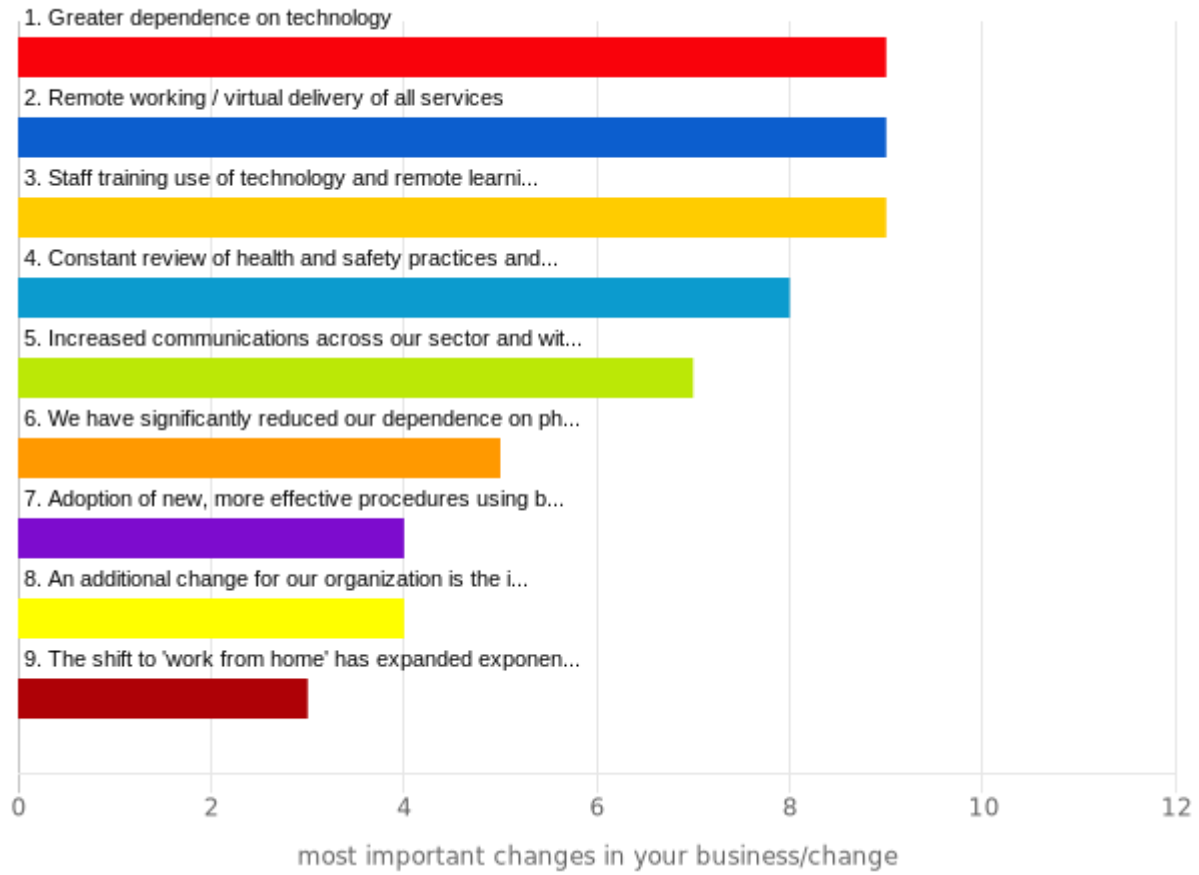
- 3.1. Additional supports for mental health and positive well-being for staff.
..Systems to address loneliness,
 - 3.1.1. Ability to support us in moving out of crisis mode and being able to ensure our staff don't burn out
 - 3.1.2. Mental Health programs are always a good place to place new investments from provincial and federal governments.
- 3.2. Sufficient and predictable funding levels -> Although I am not in favour of an ever-expanded deficit, some "stabilization" funding to help the transition through from the pandemic to post-pandemic period would be very helpful... I know, I know... I am to "get in line" for this!
 - 3.2.1. flexibility to plan for financial allocations for more than one year at a time
- 3.3. Opportunities for inclusive opportunities for housing, employment, recreation
- 3.4. increased broadband in the rural areas; affordable internet connectivity
 - 3.4.1. Greater broadband connectivity.
- 3.5. Flexibility and understanding from labour partners around the changing nature of work.
- 3.6. Consistent investment in rural communities and infrastructure (social services)
- 3.7. continuation of consistent communication from prov government
- 3.8. A recognition of the needs of vulnerable individuals in our community and the importance of programs to support them
- 3.9. Most specifically, I would be looking for sound research to guide decision making related to the flexibility of work arrangements... that is, are there industry standards/benchmarks to strive for in the post-pandemic era... based on research of productivity in the home environment as it relates to actual work completed (by objectives set)
- 3.10. support with recruitment, local post secondary commitment to sector
- 3.11. Guidance on continuing COVID/ Health protocols to prevent/ manage reoccurrence
- 3.12. Increase number of partnerships especially with non public funded organizations
- 3.13. Wage enhancement fallout, address if funds no longer available to address
- 3.14. review of administrative and reporting requirements with a view to minimize admin burden and maximize service delivery
- 3.15. community approaches to continue across sectors

2.4 – Single biggest change as a result of pandemic

Rating question or instruction:

Please select the most important changes in your organization

| Criterion "most important changes in your business/change" sorted by sum 5 selections of 9 items. Ratings submitted: 12. Total selections 58. Abstentions permitted. | | |
|---|---|--------------------|
| Nr | Item | ↓Selections |
| 1 | Greater dependence on technology | 9 |
| 2 | Remote working / virtual delivery of all services | 9 |
| 3 | Staff training use of technology and remote learning | 9 |
| 4 | Constant review of health and safety practices and protocols | 8 |
| 5 | Increased communications across our sector and with other like-minded (and some not like minded) agencies | 7 |
| 6 | We have significantly reduced our dependence on physical files and paperwork. | 5 |
| 7 | Adoption of new, more effective procedures using better technology and software. | 4 |
| 8 | An additional change for our organization is the increased delineation between "front-line workers" (who must be on hand to serve the public) and administration (who may/may not have the luxury of working from home). This is not ideal for the "entire team" philosophy. | 4 |
| 9 | The shift to 'work from home' has expanded exponentially in our organization... leading now to a change in perspectives of employees (not entirely unwarranted) of new hardships... such as travel time... that were never even considered before... not to mention the new categorization of who is "essential" and who isn't. | 3 |



Items merged before voting:**4. What is the largest change your organization has made over the past year that will continue to shape how you operate after the pandemic?**

- 4.1. Remote working / virtual delivery of all services
 - 4.1.1. virtual communication between staff and with service recipients
 - 4.1.2. Increased utilization of virtual engagements
 - 4.1.3. A move to remote learning as opposed to face to face learning.
 - 4.1.4. The prevalence of working from home and some employee preferences to remain at home following the pandemic
 - 4.1.5. Delivering services remotely
- 4.2. Adoption of new, more effective procedures using better technology and software.
- 4.3. Staff training use of technology and remote learning
- 4.4. We have significantly reduced our dependence on physical files and paperwork.
- 4.5. Constant review of health and safety practices and protocols
 - 4.5.1. Increased need for cleaning, hygiene, safety
- 4.6. Greater dependence on technology
- 4.7. The shift to 'work from home' has expanded exponentially in our organization... leading now to a change in perspectives of employees (not entirely unwarranted) of new hardships... such as travel time... that were never even considered before... not to mention the new categorization of who is "essential" and who isn't.
- 4.8. An additional change for our organization is the increased delineation between "front-line workers" (who must be on hand to serve the public) and administration (who may/may not have the luxury of working from home). This is not ideal for the "entire team" philosophy.
- 4.9. Increased communications across our sector and with other like-minded (and some not like minded) agencies

2.5 – Workforce needs and gaps

5. If time permits: what are your biggest workforce needs & gaps?

- 5.1. Labour shortage! -> qualified staff, specifically with 2 years in human services
- 5.2. digital literacy (social media, etc.)
- 5.3. Adaptability of employees and the organization as a whole.
 - 5.3.1. Resourcefulness and resiliency in the face of uncertainty.
 - 5.3.2. Need for staff to take on multiple roles, tasks (fewer people to do more stuff)
- 5.4. qualified applicants from more diverse and underrepresented groups
- 5.5. Lack of younger workers to fill vacancies caused by retirements
- 5.6. Tolerance for ambiguity.
- 5.7. Accommodating a desire to work from home versus organizational needs.
- 5.8. strong interpersonal skills and an understanding of team culture
- 5.9. A growth-oriented mindset... that is able to adapt and turn challenges into opportunities.
- 5.10. Mental health of staff
- 5.11. New hires that require less training. Able to "jump right in"
 - 5.11.1. Increased need for staff to work independently
- 5.12. we've learned that retention requires community supports and resources which may not be available in Renfrew County

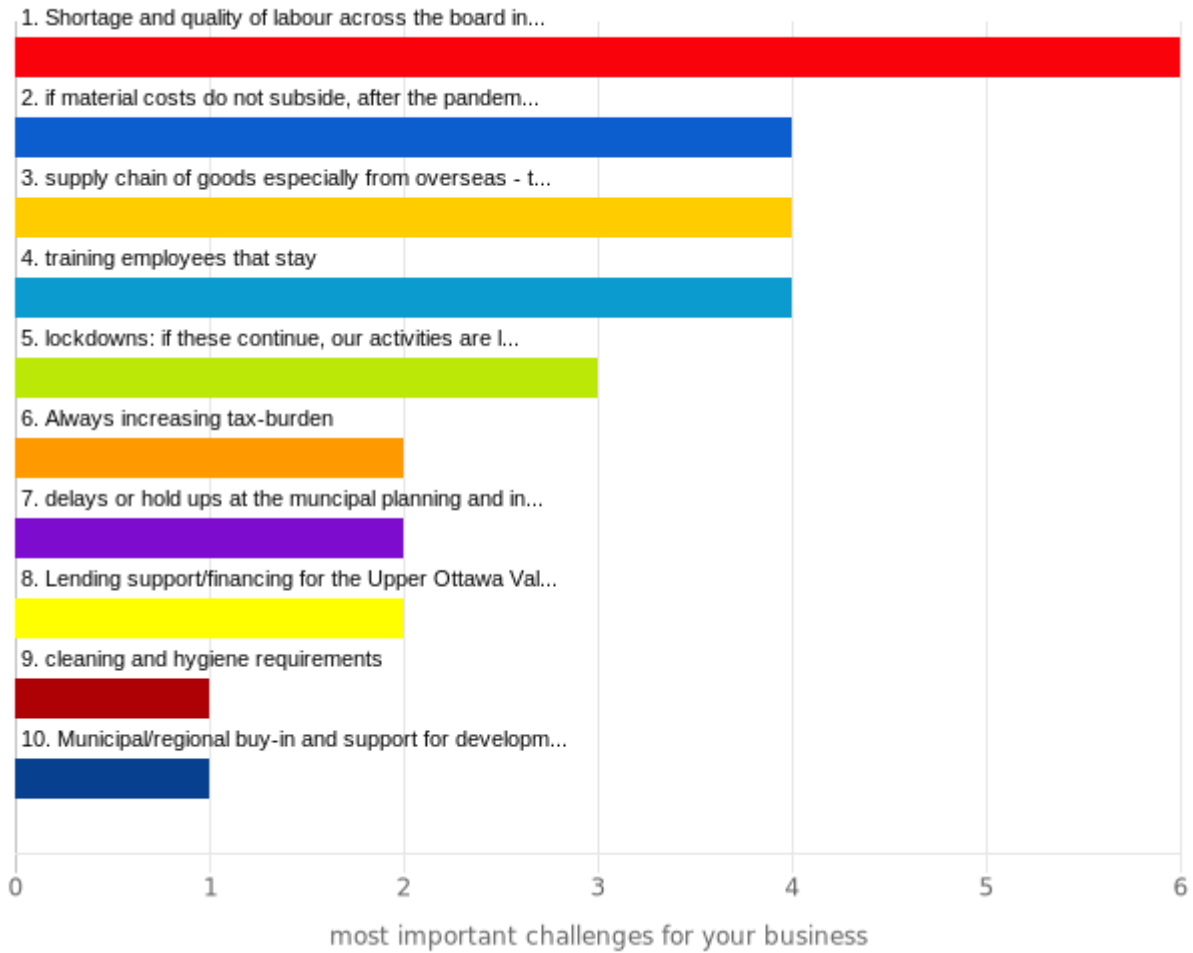
2.6 – Participants & Zoom Chat

Andrea Patrick, County of Renfrew (Community Services)
Brent Dick, Community Employment Services (Pembroke)
Cpt. Bobby Hall, Garrison Petawawa
Christina McFadden, Petawawa Military Family Resource Centre – Employment Services
Heather Salovaara, City of Pembroke
Jamie Bramburger, Algonquin College
Kathy Davis, Family and Children’s Services of Renfrew County
Kelley Lemenchick, Renfrew County Community Futures Development Corporation
Lorraine MacKenzie, Upper Ottawa Valley Chamber of Commerce
Mark Searson, Renfrew County Catholic District School Board
Monique Yashinskie, Robbie Dean Family Counselling Centre
Pat Quinn, Canadian Nuclear Laboratories
Pino Buffone, Renfrew County District School Board
Dr. Robert Cushman, Renfrew County District Health Unit
Shelley Sheedy, County of Renfrew (Long-Term Care)
Tina Williams, Community Living Upper Ottawa Valley
Oliver Jacob, Labour Market Group of Renfrew and Lanark

3.0 – Forum 3: Real estate, Construction, Developers, Trades

3.1 – Challenges

| Criterion "most important challenges for your business" sorted by sum 5 selections of 10 items. Ratings submitted: 6. Total selections 29. Abstentions permitted. | | |
|--|--|--------------------|
| Nr | Item | ↓Selections |
| 1 | Shortage and quality of labour across the board in all trades . . . and poaching going on in "scarcity of talent" | 6 |
| 2 | if material costs do not subside, after the pandemic, will individuals have the funds to build? (steel, lumber, aluminum, electrical supplies) | 4 |
| 3 | supply chain of goods especially from overseas - takes a long time... availability of what you need hinges on a long sequence of interdependent events | 4 |
| 4 | training employees that stay | 4 |
| 5 | lockdowns: if these continue, our activities are limited | 3 |
| 6 | Always increasing tax-burden | 2 |
| 7 | delays or hold ups at the municipal planning and inspection levels | 2 |
| 8 | Lending support/financing for the Upper Ottawa Valley - pre/post pandemic as a secondary/tertiary market (predictability of appreciation presents a financial barrier different from Ottawa) | 2 |
| 9 | cleaning and hygiene requirements | 1 |
| 10 | Municipal/regional buy-in and support for development - Development charges, utilities, inspections levels etc | 1 |



Criterion "most important challenges for your business" sorted by sum
 5 selections of 10 items.
 Ratings submitted: 6. Total selections 29. Abstentions permitted.

Items merged before voting:

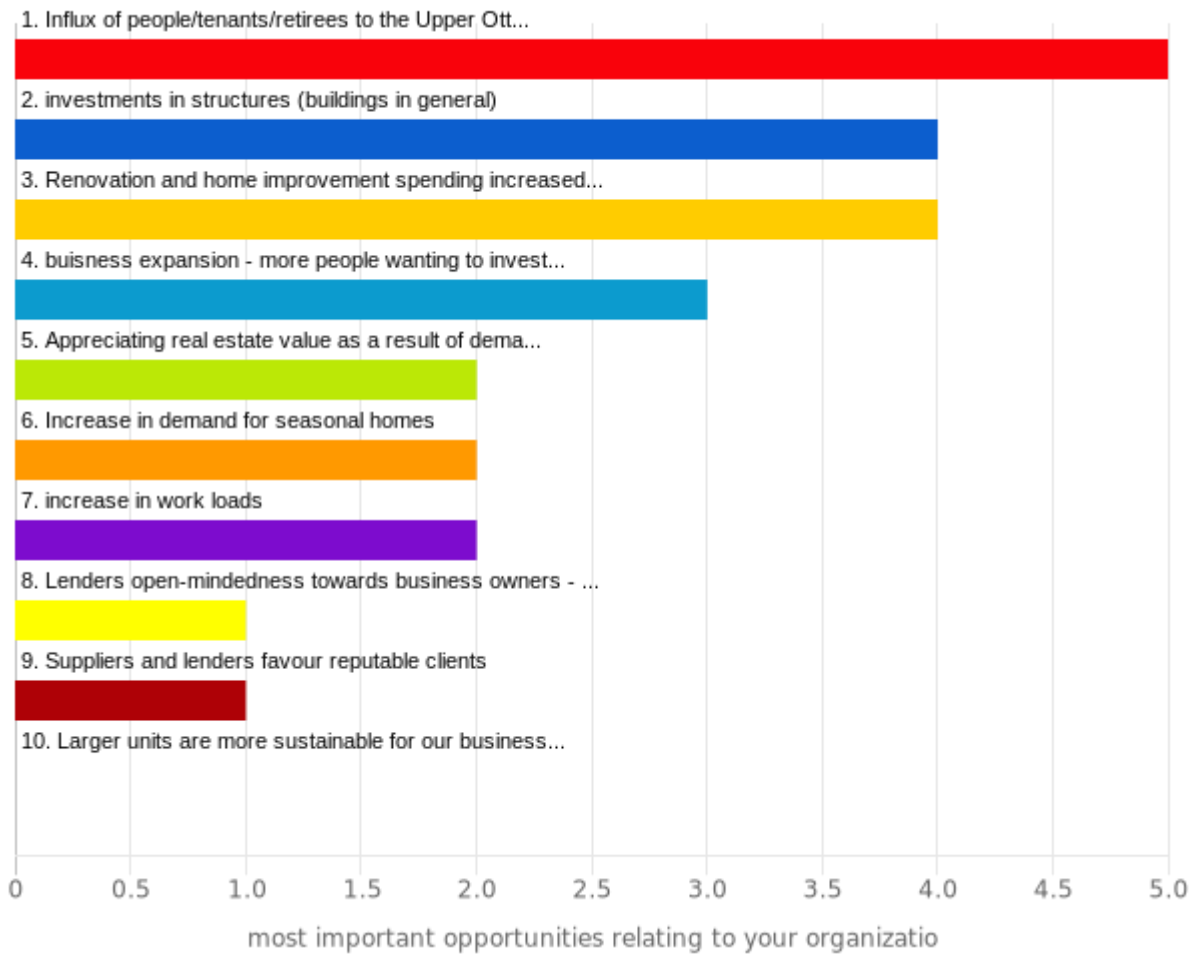
Forum 3: Real Estate, Developers, Construction and Skilled Trades

1. What challenges do you think your industry or specific business will start or continue to face after the COVID-19 pandemic?

- 1.1. if material costs do not subside, after the pandemic, will individuals have the funds to build? (steel, lumber, aluminum, electrical supplies)
 - 1.1.1. cost of materials effects trades
 - 1.1.2. dramatic increase in cost of lumber for building
- 1.2. Shortage and quality of labour across the board in all trades ... and poaching going on in "scarcity of talent"
 - 1.2.1. Shortage of labour
 - 1.2.2. Retaining quality employees
 - 1.2.3. Quality and availability of skilled trades
 - 1.2.4. hard to find and retain good skilled trades
- 1.3. Municipal/regional buy-in and support for development - Development charges, utilities, inspections levels etc
 - 1.3.1. lots of red tape at municipal level (DCs, etc)
- 1.4. training employees that stay
- 1.5. cleaning and hygiene requirements
 - 1.5.1. Excessive sanitation requirements in very rugged environment
- 1.6. Lending support/financing for the Upper Ottawa Valley - pre/post pandemic as a secondary/tertiary market (predictability of appreciation presents a financial barrier different from Ottawa)
- 1.7. supply chain of goods especially from overseas - takes a long time... availability of what you need hinges on a long sequence of interdependent events
 - 1.7.1. Suggestion - how long it would take to get materials
- 1.8. Always increasing tax-burden
- 1.9. delays or hold ups at the municipal planning and inspection levels
- 1.10. lockdowns: if these continue, our activities are limited

3.2 – Opportunities

| Criterion "most important opportunities relating to your organization" sorted by sum | | |
|--|--|--------------------|
| 5 selections of 10 items. Ratings submitted: 5. Total selections 24. Abstentions permitted. | | |
| Nr | Item | ↓Selections |
| 1 | Influx of people/tenants/retirees to the Upper Ottawa Valley from elsewhere | 5 |
| 2 | investments in structures (buildings in general) | 4 |
| 3 | Renovation and home improvement spending increased .. including home office expansion | 4 |
| 4 | business expansion - more people wanting to invest e.g. residential, commercial | 3 |
| 5 | Appreciating real estate value as a result of demand - to include major multi res | 2 |
| 6 | Increase in demand for seasonal homes | 2 |
| 7 | increase in work loads | 2 |
| 8 | Lenders open-mindedness towards business owners - some healthier relationships to open the door would be nice?! ... will depend on how we present to lenders (track record, credibility) | 1 |
| 9 | Suppliers and lenders favour reputable clients | 1 |
| 10 | Larger units are more sustainable for our business. more popular by clientele b/c more comfortable | 0 |



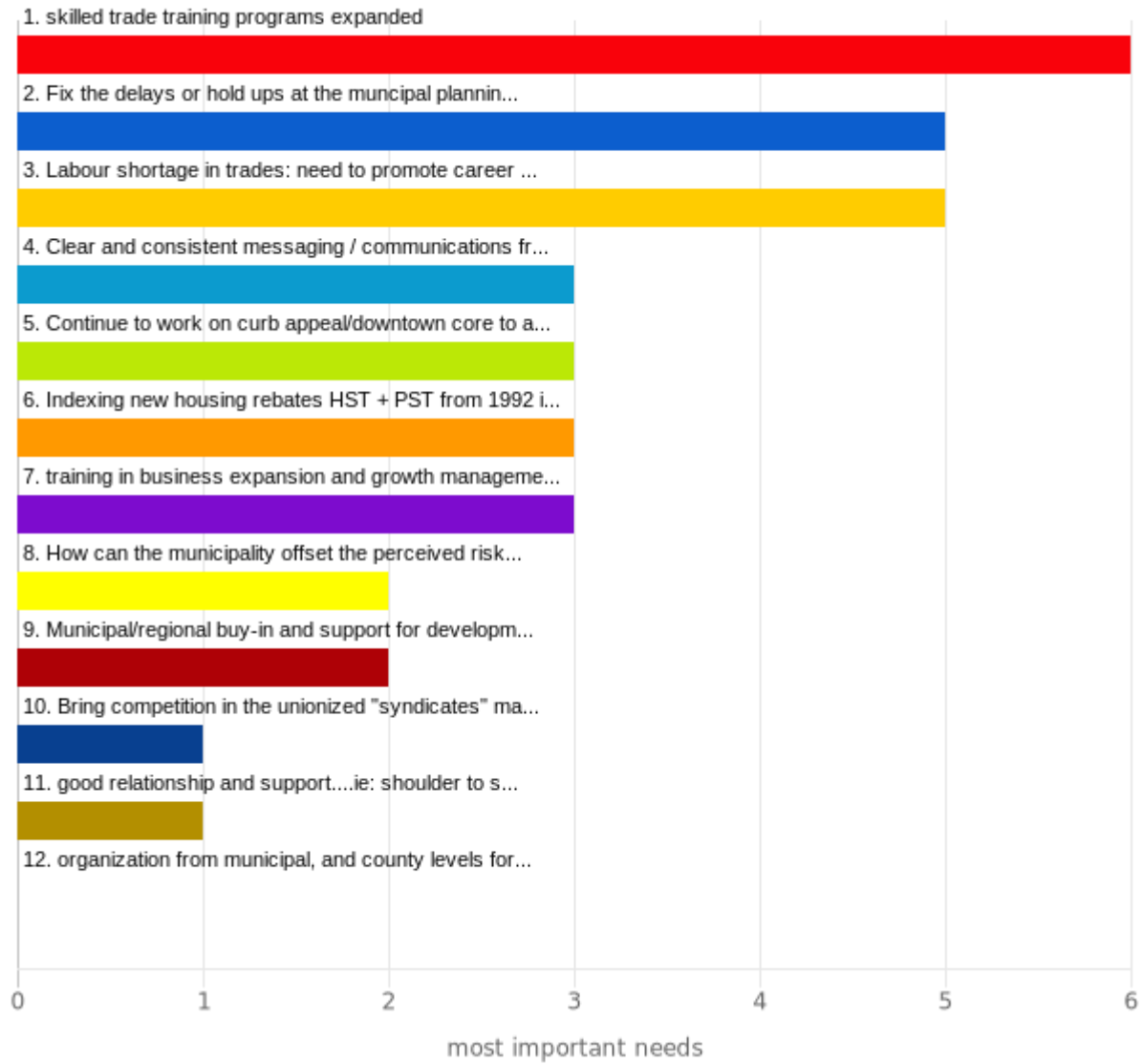
Criterion "most important opportunities relating to your organization" sorted by sum
 5 selections of 10 items.
 Ratings submitted: 5. Total selections 24. Abstentions permitted.

Items merged before voting:**2. What opportunities have developed due to the pandemic that provide your industry or business growth or innovation potential looking to the future?**

- 2.1. increase in work loads
- 2.2. Influx of people/tenants/retirees to the Upper Ottawa Valley from elsewhere
- 2.3. Larger units are more sustainable for our business. more popular by clientele b/c more comfortable
- 2.4. investments in structures (buildings in general)
- 2.5. Increase in demand for seasonal homes
 - 2.5.1. Demand for seasonal homes has gone way up
- 2.6. Appreciating real estate value as a result of demand - to include major multi res
- 2.7. business expansion - more people wanting to invest e.g. residential, commercial
- 2.8. Suppliers and lenders favour reputable clients
- 2.9. Renovation and home improvement spending increased .. including home office expansion
 - 2.9.1. Incorporating furnished home offices within the dwelling
 - 2.9.2. with people being home, renovating, and needing designs for permits for large jobs.
 - 2.9.3. Increase in renovation spending -> local spending, or investing
- 2.10. Lenders open-mindedness towards business owners - some healthier relationships to open the door would be nice?! ... will depend on how we present to lenders (track record, credibility)
- 2.11. Trend from urban to rural (reverse migration): More interest in rural Ontario. people like living in the "country-side" safer, more affordable, work from home... especially if rural broadband happens

3.3 – What are the supports you need from government?

| Criterion "most important needs" sorted by sum | | |
|--|--|--------------------|
| 6 selections of 12 items. Ratings submitted: 6. Total selections 34. Abstentions permitted. | | |
| Nr | Item | ↓Selections |
| 1 | skilled trade training programs expanded | 6 |
| 2 | Fix the delays or hold ups at the municipal planning and inspection levels | 5 |
| 3 | Labour shortage in trades: need to promote career in trades. we need to attract youth to trades !! today's immigration has not helped in construction sector. | 5 |
| 4 | Clear and consistent messaging / communications from one govt body regarding protocols, safety, opening, lockdowns etc | 3 |
| 5 | Continue to work on curb appeal/downtown core to attract folks to your area | 3 |
| 6 | Indexing new housing rebates HST + PST from 1992 implementation to today's real market value | 3 |
| 7 | training in business expansion and growth management? | 3 |
| 8 | How can the municipality offset the perceived risk from lenders to be a partner in the financing process? e.g. can municipality offer a guarantee, warranty to support an accommodation need? difficult with municipal act but maybe some creative ways to do this?! | 2 |
| 9 | Municipal/regional buy-in and support for development - Development charges, utilities, etc | 2 |
| 10 | Bring competition in the unionized "syndicates" market for labour and employers to have choices | 1 |
| 11 | good relationship and support....ie: shoulder to shoulder with country/government and business..? "we want to be able to work, we dont just want to pay taxes"..... | 1 |
| 12 | organization from municipal, and county levels for population and building expansion, build up not out, what out for ag lands, etc... communication county levels -> | 0 |

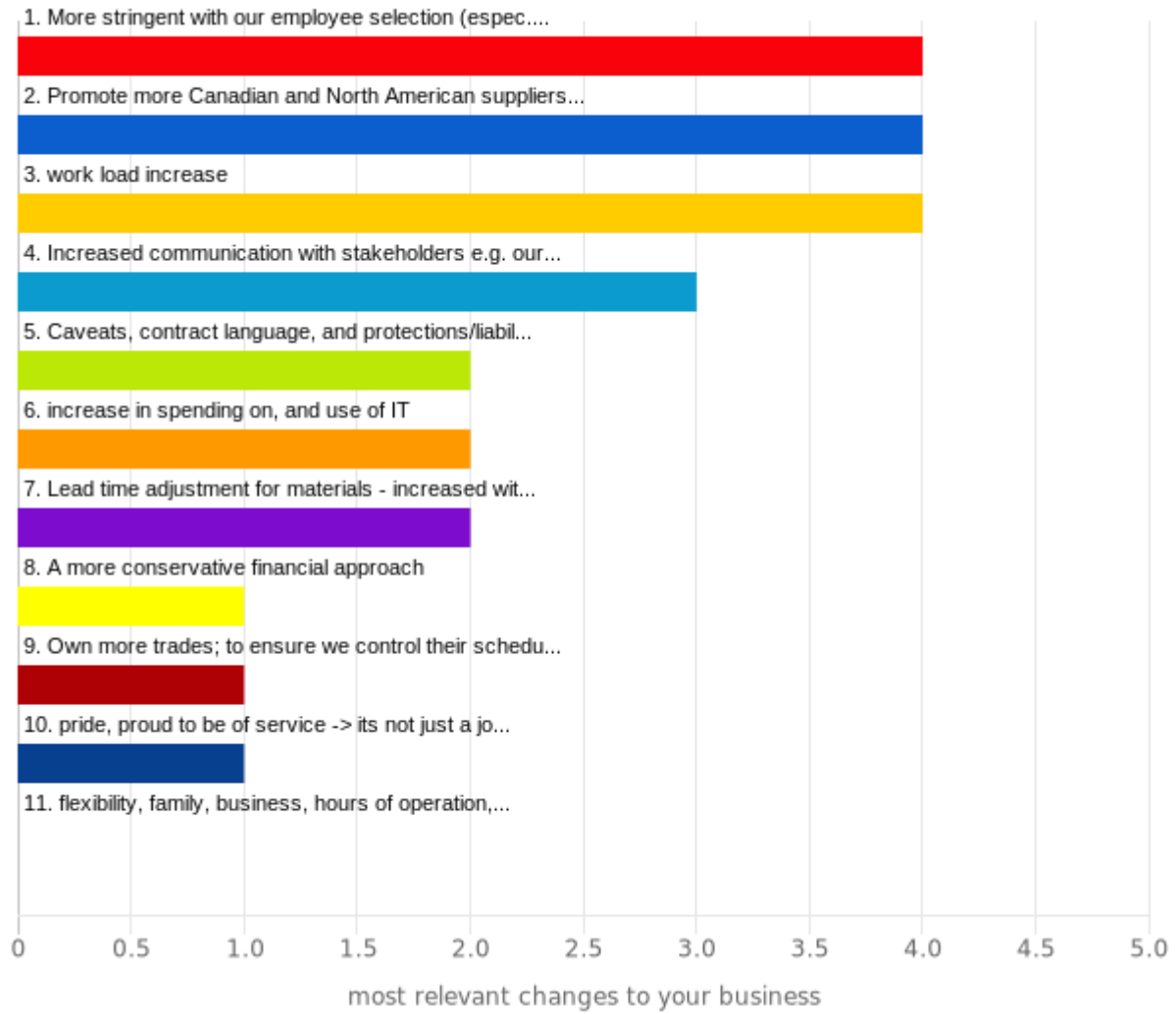


Items merged before voting:**3. What supports will you need from government and support agencies after the COVID-19 pandemic in order to ensure success and growth in your industry/business?**

- 3.1. training in business expansion and growth management?
- 3.2. Bring competition in the unionized "syndicates" market for labour and employers to have choices
- 3.3. skilled trade training programs expanded
- 3.4. Indexing new housing rebates HST + PST from 1992 implementation to today's real market value
- 3.5. Fix the delays or hold ups at the municipal planning and inspection levels
 - 3.5.1. Reducing red tape at the municipal levels
- 3.6. Municipal/regional buy-in and support for development - Development charges, utilities, etc
 - 3.6.1. Development charges are not helpful. Trust me. The development will bring the long term tax base.
- 3.7. good relationship and support....ie: shoulder to shoulder with country/government and business..? "we want to be able to work, we dont just want to pay taxes".....
- 3.8. How can the municipality offset the perceived risk from lenders to be a partner in the financing process? e.g. can municipality offer a guarantee, warranty to support an accommodation need? difficult with municipal act but maybe some creative ways to do this?!
- 3.9. Continue to work on curb appeal/downtown core to attract folks to your area
- 3.10. Clear and consistent messaging / communications from one govt body regarding protocols, safety, opening, lockdowns etc
- 3.11. organization from municipal, and county levels for population and building expansion, build up not out, what out for ag lands, etc... communication county levels ->
- 3.12. Labour shortage in trades: need to promote career in trades. we need to attract youth to trades !! today's immigration has not helped in construction sector.

3.4 – Single biggest change as a result of pandemic

| Criterion "most relevant changes to your business" sorted by sum | | |
|--|---|--------------------|
| 5 selections of 11 items. Ratings submitted: 5. Total selections 24. Abstentions permitted. | | |
| Nr | Item | ↓Selections |
| 1 | More stringent with our employee selection (especially on technical skills) e.g. longer probation period to test reliability, qualifications, competencies | 4 |
| 2 | Promote more Canadian and North American suppliers (quality and timing more reliable) | 4 |
| 3 | work load increase | 4 |
| 4 | Increased communication with stakeholders e.g. our contracting team has had to increase constant comms with lenders, subtrades, shareholders etc | 3 |
| 5 | Caveats, contract language, and protections/liability included for unknowns | 2 |
| 6 | increase in spending on, and use of IT | 2 |
| 7 | Lead time adjustment for materials - increased with greater attention applied to it. ..No more just-in-time delivery with the trades and suppliers. Pre-order and stock up! | 2 |
| 8 | A more conservative financial approach | 1 |
| 9 | Own more trades; to ensure we control their schedule/availability/quality | 1 |
| 10 | pride, proud to be of service -> its not just a job that we make revenue on, its an ability that is required. | 1 |
| 11 | flexibility, family, business, hours of operation, covid requirements | 0 |



Items merged before voting:**4. What is the largest change your business has made over the past year that will continue to shape how you operate after the pandemic?**

- 4.1. pride, proud to be of service -> its not just a job that we make revenue on, its an ability that is required.
- 4.2. Own more trades; to ensure we control their schedule/availability/quality
- 4.3. work load increase
- 4.4. increase in spending on, and use of IT
 - 4.4.1. more internet (access, speeds important)
- 4.5. More stringent with our employee selection (especially on technical skills) e.g. longer probation period to test reliability, qualifications, competencies
- 4.6. flexibility, family, business, hours of operation, Covid requirements
- 4.7. Lead time adjustment for materials - increased with greater attention applied to it. ..No more just-in-time delivery with the trades and suppliers. Pre-order and stock up!
- 4.8. A more conservative financial approach
- 4.9. Caveats, contract language, and protections/liability included for unknowns
- 4.10. Increased communication with stakeholders e.g. our contracting team has had to increase constant comms with lenders, subtrades, shareholders etc
- 4.11. Promote more Canadian and North American suppliers (quality and timing more reliable)

3.5 – Workforce needs and gaps

5. If time permits: what are your biggest workforce needs & gaps?

- 5.1. Most of the Skilled trades; rough carpentry, concrete.
 - 5.1.1. Carpentry, masonry, general labor, concrete construction
- 5.2. some...want the value before showing their worth (need to prove themselves first - many employees have high expectations but don't realize they need to prove it first)
- 5.3. Attributes beyond skills; loyalty, commitment, leadership, and communication;
 - 5.3.1. commitment from an employee
- 5.4. small business need to find staff that 'suit' and want to stay in the area
- 5.5. Team leaders who are better organizers, see further ahead than just the following day and motivate and teach apprentices the passion to work
- 5.6. We need a push from society/government to pursue a career in trades! (reduce stigma, you can make more \$, better lifestyle, flexibility etc.)

3.6 – Participants & Zoom Chat

Brent Dick, Community Employment Services (Pembroke)
David Wybou, County of Renfrew (Economic Development Services)
Heather Salovaara, City of Pembroke
Kari Salovaara, Quality Homes and Renovations
Kimberly Lehman, Kimberly R. Lehman Architectural Design Consultant
Lorraine MacKenzie, Upper Ottawa Valley Chamber of Commerce
Oliver Jacob, Labour Market Group of Renfrew and Lanark
Pascale Lépine, Lépine Apartments
Francis Lépine, Lépine Apartments
Pauline Fitchett, Labour Market Group of Renfrew and Lanark
Tim Streek, TSH Development Group

Final thoughts and comments:

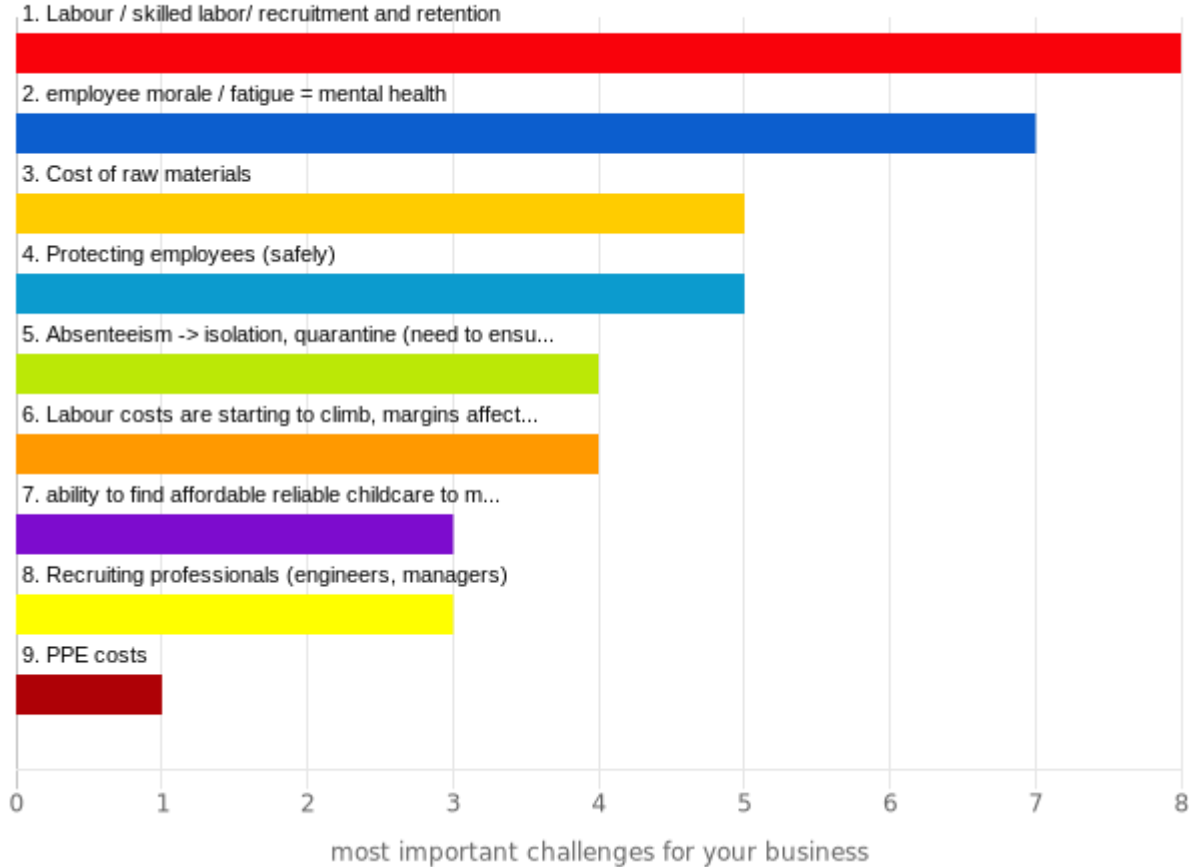
- 6.1. Unions have so much power with regards to workforce, # of trades people
- 6.2. even with the trades apprentices funding programs... the trades don't want to train their competition, is hard for 'kids' to find a mentor onsite
- 6.3. i appreciate you bringing us together today... chance to share across our industry ... I picked up some nuggets

Zoom Chat

4.0 – Forum 4: Industrial, Manufacturing, Agriculture, Transportation, Forestry

4.1 – Challenges

| Criterion "most important challenges for your business" sorted by sum 5 selections of 9 items. Ratings submitted: 8. Total selections 40. Abstentions permitted. | | |
|---|--|--------------------|
| Nr | Item | ↓Selections |
| 1 | Labour / skilled labor/ recruitment and retention | 8 |
| 2 | employee morale / fatigue = mental health | 7 |
| 3 | Cost of raw materials | 5 |
| 4 | Protecting employees (safely) | 5 |
| 5 | Absenteeism -> isolation, quarantine (need to ensure employee safety but seeing #s up and need to ensure productivity) | 4 |
| 6 | Labour costs are starting to climb, margins affected. | 4 |
| 7 | ability to find affordable reliable childcare to minimize absenteeism | 3 |
| 8 | Recruiting professionals (engineers, managers) | 3 |
| 9 | PPE costs | 1 |



Items merged before voting:

Question or instruction for the Deep-dive:

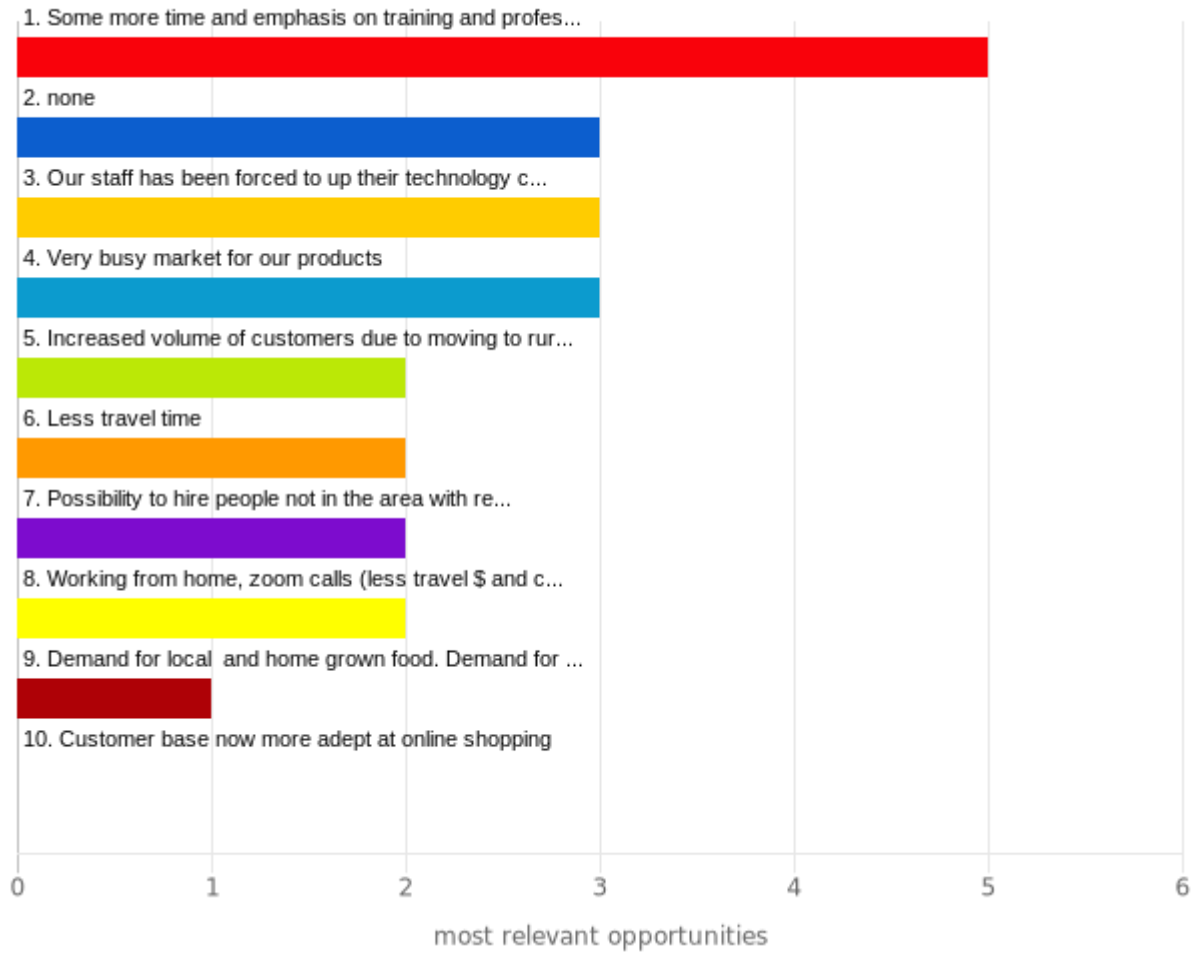
Forum 4: Industrial, Transportation, Manufacturing, Agriculture and Forestry

1. What challenges do you think your industry or specific business will start or continue to face after the COVID-19 pandemic?

- 1.1. Labour / skilled labor/ recruitment and retention
 - 1.1.1. Skilled trades and retention of skilled persons
 - 1.1.2. Finding enough full-time employees
 - 1.1.3. Lack of skilled trades
 - 1.1.4. need more skilled trades
 - 1.1.5. Labour & recruitment
- 1.2. Protecting employees (safely)
 - 1.2.1. safety, cleaning and hygiene requirements
 - 1.2.1.1. Absenteeism -> isolation, quarantine (need to ensure employee safety but seeing #s up and need to ensure productivity)
- 1.3. employee morale / fatigue = mental health
- 1.4. Recruiting professionals (engineers, managers)
 - 1.4.1. Process automation engineers
- 1.5. PPE costs
- 1.6. Labour costs are starting to climb, margins affected.
- 1.7. Cost of raw materials
- 1.8. ability to find affordable reliable childcare to minimize absenteeism

4.2 – Opportunities

| Criterion "most relevant opportunities" sorted by sum 5 selections of 10 items. Ratings submitted: 6. Total selections 23. Abstentions permitted. | | |
|--|---|--------------------|
| Nr | Item | ↓Selections |
| 1 | Some more time and emphasis on training and professional development .. using alternative methods | 5 |
| 2 | none | 3 |
| 3 | Our staff has been forced to up their technology capabilities e.g. virtual meetings, etc | 3 |
| 4 | Very busy market for our products | 3 |
| 5 | Increased volume of customers due to moving to rural area | 2 |
| 6 | Less travel time | 2 |
| 7 | Possibility to hire people not in the area with remote work | 2 |
| 8 | Working from home, zoom calls (less travel \$ and customer's acceptance). | 2 |
| 9 | Demand for local and home-grown food. Demand for lawn & garden, backyard. | 1 |
| 10 | Customer base now more adept at online shopping | 0 |



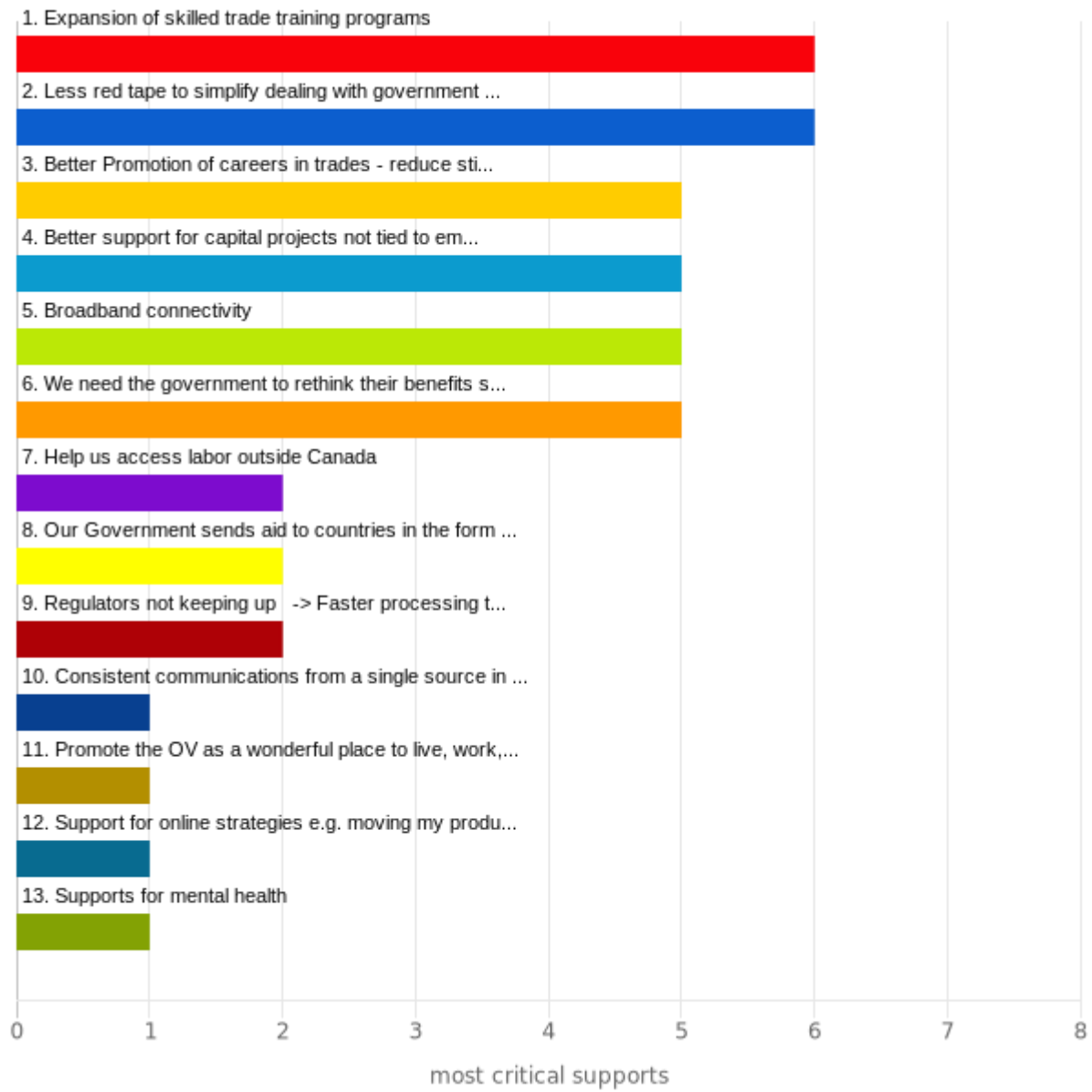
Items merged before voting:

2. What opportunities have developed due to the pandemic that provide your industry or business growth or innovation potential looking to the future?

- 2.1. Customer base now more adept at online shopping
 - 2.1.1. Our customers have been forced to become comfortable with virtual buying experience
- 2.2. Very busy market for our products
- 2.3. Working from home, zoom calls (less travel \$ and customer's acceptance).
- 2.4. Possibility to hire people not in the area with remote work
- 2.5. none
- 2.6. Some more time and emphasis on training and professional development .. using alternative methods
 - 2.6.1. Better Professional development coming available online.
- 2.7. Demand for local and home-grown food. Demand for lawn & garden, backyard.
- 2.8. Our staff has been forced to up their technology capabilities e.g. virtual meetings, etc
- 2.9. Less travel time
- 2.10. Increased volume of customers due to moving to rural area

4.3 – What are the supports you need from government?

| Criterion "most critical supports" sorted by sum | | |
|---|--|--------------------|
| 6 selections of 13 items. | | |
| Ratings submitted: 8. Total selections 42. Abstentions permitted. | | |
| Nr | Item | ↓Selections |
| 1 | Expansion of skilled trade training programs | 6 |
| 2 | Less red tape to simplify dealing with government and for accessing programs | 6 |
| 3 | Better Promotion of careers in trades - reduce stigma, attract youth, | 5 |
| 4 | Better support for capital projects not tied to employment creation (e.g. we can scale business up with automation opportunities but that won't necessarily result in job creation) | 5 |
| 5 | Broadband connectivity | 5 |
| 6 | We need the government to rethink their benefits strategy to incent people to work | 5 |
| 7 | Help us access labor outside Canada | 2 |
| 8 | Our Government sends aid to countries in the form of financing. When those same countries need to buy product that we manufacture/grow/develop, there needs to be more return/marketing of for our Canadian companies. | 2 |
| 9 | Regulators not keeping up -> Faster processing times of regulatory barriers (licenses/permits, product registrations, etc) | 2 |
| 10 | Consistent communications from a single source in government about protocols, safety, openings | 1 |
| 11 | Promote the OV as a wonderful place to live, work, play | 1 |
| 12 | Support for online strategies e.g. moving my products and services online | 1 |
| 13 | Supports for mental health | 1 |

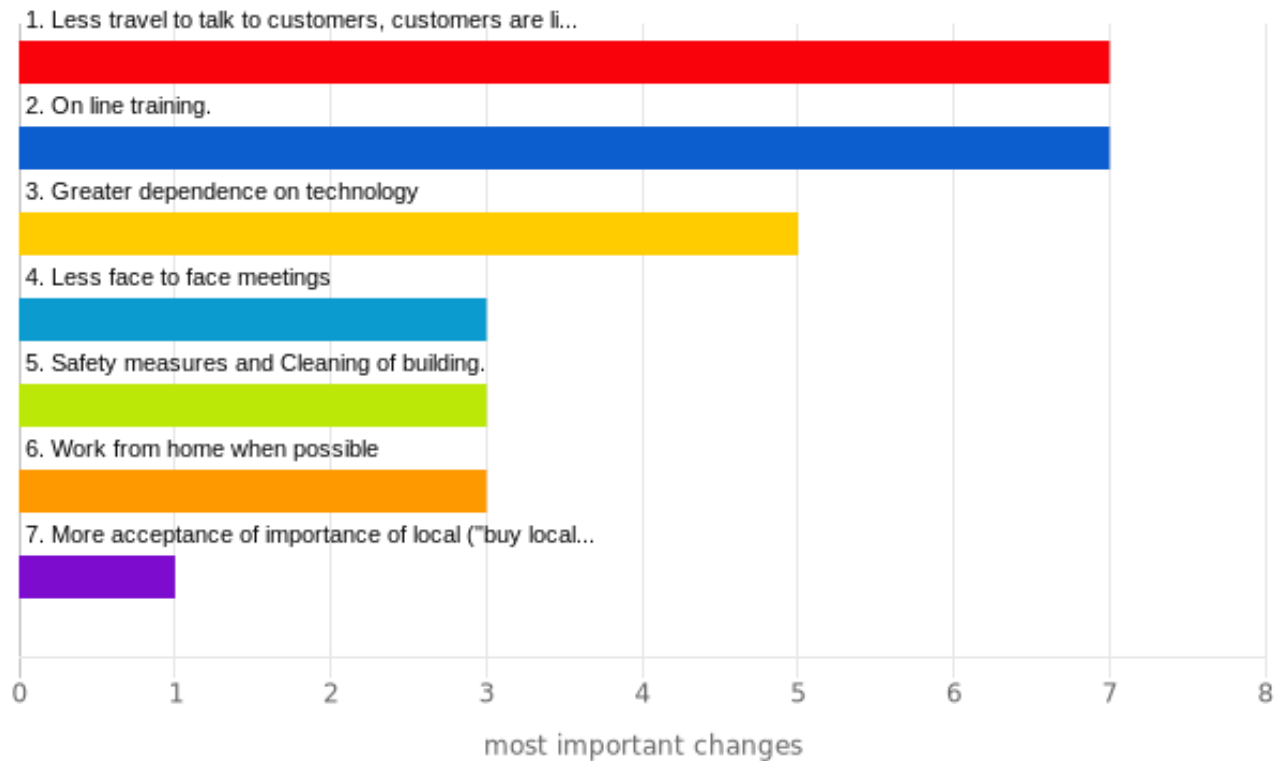


Items merged before voting:**3. What supports will you need from government and support agencies after the COVID-19 pandemic in order to ensure success and growth in your industry/business?**

- 3.1. Better support for capital projects not tied to employment creation (e.g. we can scale business up with automation opportunities but that won't necessarily result in job creation)
- 3.2. Less red tape to simplify dealing with government and for accessing programs (prov and federal programs form filling are painful, not municipal)
 - 3.2.1. Less red tape for accessing programs
- 3.3. Promote the OV as a wonderful place to live, work, play
 - 3.3.1. Promotion of the Ottawa Valley as a great place to live
- 3.4. Expansion of skilled trade training programs
- 3.5. Regulators not keeping up -> Faster processing times of regulatory barriers (licenses/permits, product registrations, etc)
 - 3.5.1. CFIA is losing staff and not training new staff
- 3.6. Support for online strategies e.g. moving my products and services online
- 3.7. We need the government to rethink their benefits strategy to incent people to work
- 3.8. Better Promotion of careers in trades - reduce stigma, attract youth,
 - 3.8.1. Promotion of Trades & expansion to include AZ Drivers
- 3.9. Consistent communications from a single source in government about protocols, safety, openings
- 3.10. Help us access labor outside Canada
- 3.11. Supports for mental health
- 3.12. Our Government sends aid to countries in the form of financing. When those same countries need to buy product that we manufacture/grow/develop, there needs to be more return/marketing of for our Canadian companies.

4.4 – Single biggest change as a result of pandemic

| Criterion "most important changes" sorted by sum 4 selections of 7 items. Ratings submitted: 8. Total selections 29. Abstentions permitted. | | |
|--|---|-------------|
| Nr | Item | ↓Selections |
| 1 | Less travel to talk to customers, customers are likely to accept less face/face meetings. ..Less trips out of the area. | 7 |
| 2 | On line training. | 7 |
| 3 | Greater dependence on technology | 5 |
| 4 | Less face to face meetings | 3 |
| 5 | Safety measures and Cleaning of building. | 3 |
| 6 | Work from home when possible | 3 |
| 7 | More acceptance of importance of local ("buy local") | 1 |



Items merged before voting:

4. What is the largest change your business has made over the past year that will continue to shape how you operate after the pandemic?

- 4.1. Safety measures and Cleaning of building.
 - 4.1.1. Safety & PPE
- 4.2. On line training.
 - 4.2.1. On line training.
- 4.3. Less face to face meetings
 - 4.3.1. Fewer meetings overall
- 4.4. Work from home when possible
 - 4.4.1. Remote work sometimes.
- 4.5. Less travel to talk to customers, customers are likely to accept less face/face meetings. ..Less trips out of the area.
- 4.6. More acceptance of importance of local ("buy local")
 - 4.6.1. Buying local produced
- 4.7. Greater dependence on technology

4.5 – Workforce needs and gaps

5. If time permits: what are your biggest workforce needs & gaps?

- 5.1. Unskilled but trainable labour
 - 5.1.1. Entry level - labourers
 - 5.1.2. Unskilled Labour
- 5.2. Engineers
 - 5.2.1. Process automation engineers
- 5.3. AZ Truck driver that is also willing to do some physical work.
 - 5.3.1. AZ Drivers
 - 5.3.2. Truck driver (A/Z)
- 5.4. Skilled Trades
 - 5.4.1. Millwrights
 - 5.4.2. Millwrights
 - 5.4.3. Industrial electricians
 - 5.4.4. Skilled fabricators
 - 5.4.5. Machinists
- 5.5. Childcare - so that female workers do not have to exit the workforce
- 5.6. Process Managers
- 5.7. Painters (automotive)
- 5.8. Young worker with interest in agriculture

4.6 – Participants & Zoom Chat

Alastair Baird, County of Renfrew (Economic Development Services)
Alexandre Ouellette, Roseburg Forest Products
Brent Clifford, M&R Feeds
Daniel Mellen, KI Canada
Heather Salovaara, City of Pembroke
Jamie Bramburger, Algonquin College
Keanan Stone, Valley Bio
Lorraine McKenzie, Upper Ottawa Valley Chamber of Commerce
Lynn Saunders, Plaintree Systems Inc.
Pauline Fitchett, Labour Market Group of Renfrew and Lanark
Reuben Stone, Valley Bio
Sharron Donohue, Cassidy's Transfer & Storage Ltd.

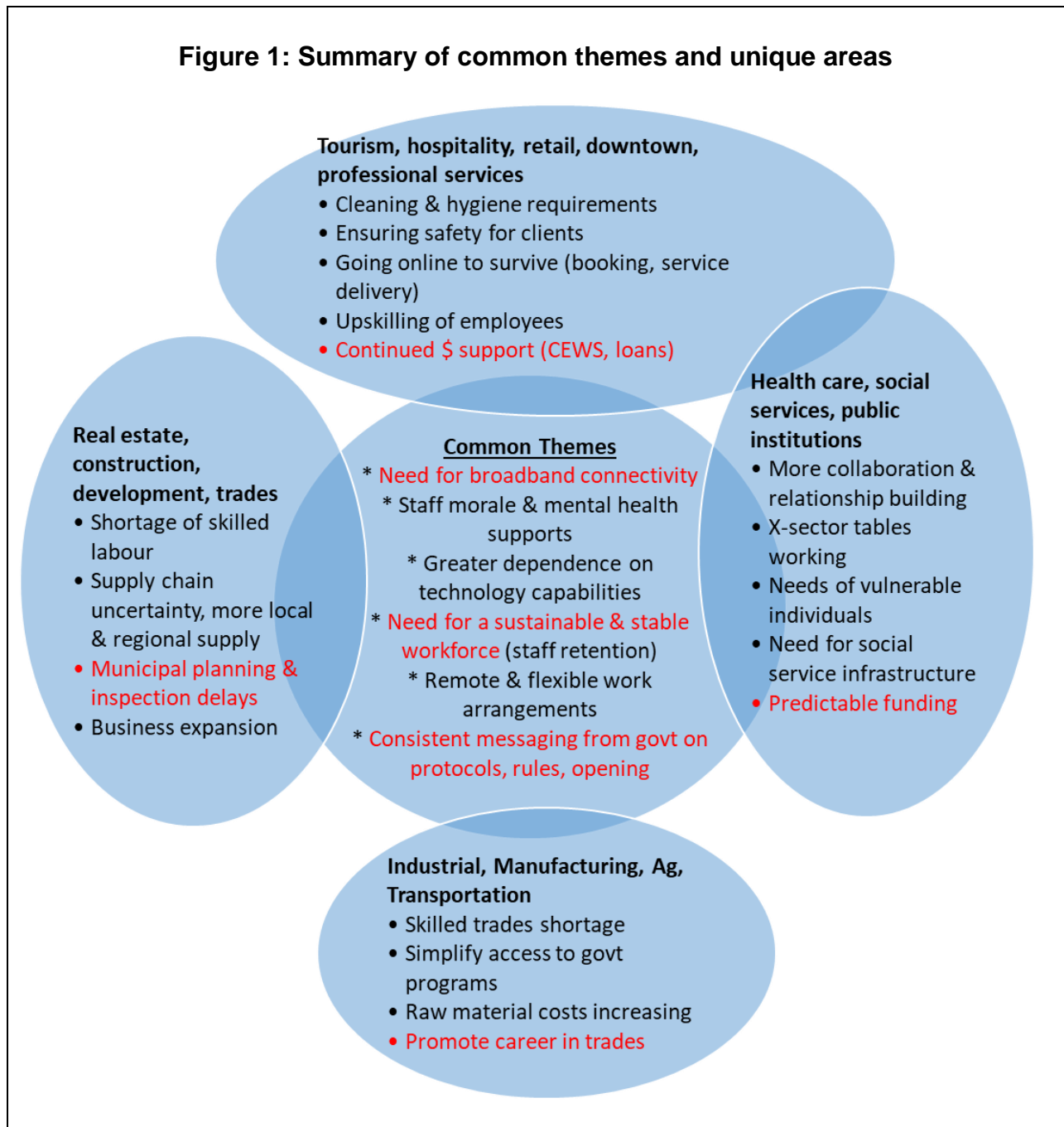
Questions and Comments

- 6.1. need to ensure that you take these results and "run it up the chain" !!!
- 6.2. many of the issues (trades, broadband, redtape etc) have been with us for a long time. i dont see it getting any better
- 6.3. important to highlight the dearth in childcare in the valley -> has huge impact on mothers wanting to come back to the workforce
- 6.4. fed government needs to look at huge gap of supports between rural vs. urban
- 6.5. rural businesses need succession plans ... if i was a buyer, first thing i would look at is availability of skilled labour and trained workforce
- 6.6. in agriculture, interesting dynamic emerging - previously, renfrew county was being viewed as a hidden gem where value of land was still possible to make a profit. RC has now crossed the line where average profit will not cover the capital asset cost
- 6.7. Receiving CERB loan was easy. Trying to submit a Request for Standing Order with CFB Petawawa is not. Government red tape to do business is overwhelming. CNL is overboard on red tape.
- 6.8. Need to ensure that we attract more people to the Ottawa Valley... why are we different, what appeals to people?

Appendices

A – Aggregated Findings

Figure 1 shows a rough summary of the common and unique themes. The common themes are areas highlighted by all groups. The group-specific points indicate the item was unique to the group or the group highlighted this as particularly important.



B – Session Overview

Agenda Questions

1. What challenges do you think your industry or specific business will start or continue to face after the COVID-19 pandemic?
2. What opportunities have developed due to the pandemic that provide your industry or business growth or innovation potential looking to the future?
3. What supports will you need from government and support agencies after the COVID-19 pandemic in order to ensure success and growth in your industry/business?
4. What is the largest change your business has made over the past year that will continue to shape how you operate after the pandemic?
5. If time permits: what are your biggest workforce needs & gaps?

Forum 1: Tourism, Retail, Hospitality, Hotels, Downtowns and Professional Services Forum

Background: The COVID-19 pandemic has had a profound impact on the tourism, retail and hospitality sectors as businesses have been forced to keep their doors closed, have been limited to offering curbside services and have needed to shift their focus to online sales opportunities. For some tourism businesses, mandated extended closures have been devastating. With travel restrictions in place, tourism has declined affecting hotels and restaurants, and no one knows how customer behaviour will be affected moving forward. We will tackle the following questions about how this sector will emerge from the pandemic.

Forum 2: Healthcare, Social Services, Not-for-Profit Agencies and Public Institutions

Background: The COVID-19 pandemic has produced many health care heroes, but it has also exposed labour market shortages particularly in long-term care facilities. Public health directives to keep people safe have also required many public services to change the way they operate including educational institutions who have had to pivot to deliver teaching remotely. Not for profit organizations and social services organizations have felt the strain of supporting individuals who have lost their jobs or who are struggling with their mental health, and charities have felt the pressure of donor fatigue at a time when the demands for funding have never been greater. We will tackle the following questions about how this sector will emerge from the pandemic.

Forum 3: Real Estate, Developers, Construction and Skilled Trades

Background: The housing market in Renfrew County has never been stronger, but there aren't enough homes to sell. With record low interest and mortgage rates, and more people leaving larger urban centres for rural areas, the demands on developers to build more is causing strain on the availability of skilled trades workers. Government investment in public infrastructure to keep the economy moving is also driving demand for construction workers. We will tackle the following questions about how this sector will emerge from the pandemic.

Forum 4: Industrial, Transportation, Manufacturing, Agriculture and Forestry

Background: Prior to the COVID-19 pandemic, many employers in the industrial, manufacturing, agriculture and forestry sectors were already facing labour market shortages. During the pandemic, some manufacturing facilities retooled or adapted their operations, but there were challenges in the supply chain and lost sales as customers scaled back budgets. At the same time, the transportation sector was busy with home deliveries, resulting in a shortage of drivers. A new administration in the United States government, a closed Canadian-American border and ongoing tariff disputes continue to create challenges for companies that export products to Canada's largest trading partner. We will tackle the following questions about how this sector will emerge from the pandemic.

C – Process Overview

The forums were conducted using an electronic meeting system (EMS), an innovative facilitation process developed from research at the Smith School of Business at Queen's. The Queen's EMS, called "the Decision Centre", combines expert facilitation with a state-of-the-art group decision support system to enable groups to rapidly accelerate idea generation and consensus building. This facility consists of a network of laptops accessing software designed to support idea generation, idea consolidation, idea evaluation and planning. The tool supports, but does not replace, verbal interaction; typically, 25% of interaction takes place on the computers. Feedback from groups who have used the Executive Decision Centre process includes: meeting times can be cut in half; participation goes way up; better idea generation and alternative evaluation; a more structured process; and automatic documentation of deliberations.

Over 1500 organizations around North America use the Centre for meetings such as: strategic planning, visioning, annual planning, focus groups, team building, budgeting, program review, project planning, risk assessment, job profiling, 360-degree feedback, alternative evaluation, new product development and a variety of other meeting types. This approach can be employed in both face to face and virtual environments.

In the session, participants were asked, for example, "what are the critical challenges your organization or sector is facing as a result of the pandemic?" Participants typed in ideas on the laptops all of which appeared on a public screen at the front of the room (or, if in virtual mode, on everyone's screens). These ideas were then discussed and categorized into common themes. The group was then asked "if we could only address five of these in the next year, which ones are most critical?" Individuals selected his/her top 5 and the overall results were then displayed to the group and further discussed.

For more information on this process, please contact:

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